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ABSTRACT

A growing number of charter schools are being designed, launched, and operated by community-based nonprofit organizations (CBOs). This resource guide is intended to target a priority technical assistance need: creating and sustaining a healthy relationship between a new charter school and a founding community organization, leading to the creation and operation of a highly successful school. Chapter 1 provides an introduction to CBO-linked charter schools with several examples that capture the breadth and significance of this important and far-reaching development. Chapter 2 describes the motivation of CBOs that have chosen to get involved in the startup of charter schools and provides information about preplanning activities. Chapter 3 offers guidance on how to structure the charter-school planning process. Chapter 4 explores the different types of relationships that CBOs and charter schools are forming. Chapter 5 delineates characteristics of successful partnerships and discusses a number of proven strategies for overcoming turf issues and other barriers to effective collaboration between CBOs and charter schools. Finally, chapter 6 includes a selected list of organizations, publications, Web sites, and other resources that will be of great use to community-based nonprofit organizations interested in launching charter schools. (RT)

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How Community-Based Organizations Can Start Charter Schools

Produced under a grant from the Annie E. Casey Foundation

CHARTER FRIENDS NATIONAL NETWORK
connecting and supporting statewide charter school initiatives

The Annie E. Casey Foundation

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About the Author

How Community-Based Organizations Can Start Charter Schools was created by Frank Martinelli, president of the Center for Public Skills Training in Milwaukee. He has provided training and management assistance to nonprofit organizations and public agencies since 1976. Frank has a special interest in charter school start-ups by nonprofit youth and family-serving organizations and has assisted in the planning of three such charter schools in Milwaukee.

Areas of expertise include volunteer management, strategic planning facilitation, designing and leading high priority meetings and conferences, board and staff retreats, and forging community collaborations and alliances. Frank is also a member of the faculty of The Learning Institute, a national joint venture of the Society for Nonprofit Organizations, United Way of America, and the University of Wisconsin-Extension designed to deliver training through a range of emerging technologies.

Acknowledgments

This publication chronicles the path-breaking work of many organizations and individuals throughout the country. Their vision, creativity and risk-taking are an inspiration to the rest of us. The author gratefully acknowledges the assistance of the many people who contributed their ideas, experience, and wisdom to this resource guide, including Kevin Andrews, Sheila Balboni, Sue Bragato, Linda Brown, Meg Campbell, Lydell Carter, Velma Cobb, John Conley, Marie Crockett, Richard Farias, Jim Ford, Howard Garber, Jim Griffin, Sonia Gutierrez, Noel Hagan, Glenn Haley, Larry Kameya, Joanna Lennon, Beverly Luckenbill, Ron Manderschied, Bruno Manno, Alex Medler, Cathleen Micheaels, Mike Milkie, Heather Ngoma, Patsy O'Neill, Dan Quisenberry, Allison Rohrer, Melinda Vernon, Jill Wheeler and Richard Zalewski. Bryan C. Hassel and Michelle Godard McNiff of Public Impact and Janice Uttley served as editors of the publication.

Charter Schools

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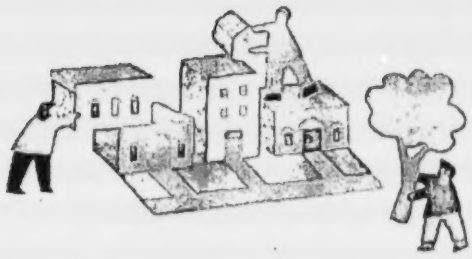
Executive Summary



A growing number of charter schools are being designed, launched and operated by community-based nonprofit organizations (CBOs). To describe these charter schools, we have coined the term "CBO-linked charter schools." Though the involvement of nonprofits has provided invaluable resources for charter schools across the country, these relationships have also presented challenges of governance and communication.

This resource guide is intended to target a priority technical assistance need — creating and sustaining a healthy relationship between a new charter school and a founding community organization, leading to the creation and operation of a highly successful school. The guide draws on the latest thinking about building effective partnerships and alliances. It also relies heavily on interviews with the leaders of 15 charter schools founded by pre-existing nonprofits, the leaders of several state charter school support organizations, and representatives of some of the national nonprofits that are actively supporting charter school start-ups by their local affiliates.

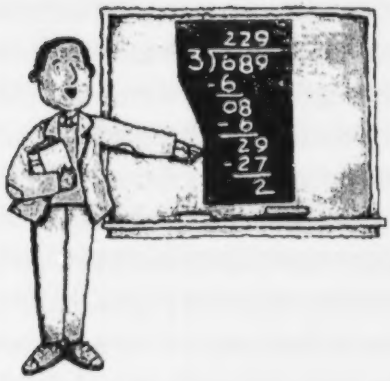
Several audiences will benefit from the information in this guide, including:

- community-based organizations interested in starting or partnering with charter schools;
- charter schools seeking to collaborate with CBOs; national organizations aiming to help local affiliates become involved with charter schools; and
- other organizations that provide assistance to charter schools and their partners.

This guide consists of six chapters:

- Chapter 1 provides an introduction to CBO-linked charter schools with several examples that capture the breadth and significance of this important and far-reaching development;
- Chapter 2 describes the motivation of CBOs that have chosen to get involved in the start-up of charter schools and provides information about pre-planning activities;
- Chapter 3 offers guidance on how to structure the charter school planning process;

- Chapter 4 explores the different types of relationships that CBOs and charter schools are forming;
- Chapter 5 delineates characteristics of successful partnerships and discusses a number of proven strategies for overcoming turf issues and other barriers to effective collaboration between CBOs and charter schools; and,
- Chapter 6 includes a selected list of organizations, publications, Web sites and other resources that will be of great use to community-based nonprofit organizations interested in launching charter schools.



Chapter 1: Introduction

A growing number of charter schools are being designed, launched and operated by community-based nonprofit organizations. Though the involvement of nonprofits has provided invaluable resources for charter schools across the country, these relationships have also presented challenges of governance and communication.

This resource guide is intended to target a priority technical assistance need — creating and sustaining a healthy relationship between a new charter school and a founding community organization, leading to the creation and operation of a highly successful school. The guide draws on the latest thinking about building effective partnerships and alliances. It also relies heavily on interviews with the leaders of 15 charter schools founded by pre-existing nonprofits, the leaders of several state charter school resource centers, and representatives of some of the national nonprofits that are actively supporting charter school start-ups by their local affiliates.

Growing Number of CBO-Linked Charter Schools

An important shift has been taking place in the way community-based nonprofit organizations (CBOs) and schools approach collaboration with each other. More and more, they have come to see that the best way to fulfill their separate missions is to seek and build on partnerships with each other. Increasingly, nonprofits, especially those serving families and children, are seeing partnerships with schools as a way to increase the impact of their programs and services. At the same time, school leaders understand that children and families face many challenges, and student success hinges on the ability of the school and community together to unite in overcoming barriers to learning.

The emergence of the charter school movement has contributed new energy and

vitality to this growing emphasis on school-community collaboration. The ability of charter school organizers to design schools from scratch, free of some of the barriers that historically have impeded school-community collaboration, has created a number of exciting partnerships. In the past community-based groups would sometimes encounter resistance from schools when attempting to build a collaboration or partnership. Now, by playing various roles in the founding of new charter schools, these same organizations can imbed collaboration into the very structure of the charter schools they are helping to create.

Another factor that is contributing to the increased involvement of nonprofit organizations in the founding of charter schools is their interest in developing a "one stop shop" service experience. By bringing educational programming into the array of

services already being offered, these organizations can create a seamless delivery system that better meets the interconnected needs of the people they serve.

What's Happening?

At this point, it is difficult to assess the precise number of charter schools that have been founded by pre-existing nonprofit organizations. The nature of the partnerships can vary considerably, ranging from a spirit of cooperation and support to situations in which the charter school exists as a major program or department within the legal structure of the founding organization.

One thing is clear, however: increasingly nonprofits are seizing upon the opportunity to provide direct educational programming through the vehicle of charter schools that they plan, launch and operate. In some cases, nonprofit organizations, with the experience of operating one charter school, have already begun to open additional ones.

Innovative ideas travel fast within the nonprofit sector, which is highly organized and connected through regional and national networks, conferences and associations, and, of course, the Internet. Added to this is the difficulty experienced by early charter school organizers who, in addition to designing and implementing educational programs, had to build new organizations from scratch. Often these innovative educators lacked budgeting, personnel, fund-raising and financial management skills. By bringing these critical management skills to partnerships with charter schools, founding CBOs free the educators to focus on educational matters. For these reasons, it is clear that nonprofits will play an expanding role in the charter school movement in the coming years.

CBO-Linked Charter Schools in Local Communities

The growing involvement of community-based nonprofit organizations in charter school development is taking a number of forms. In this publication, we have chosen the term "CBO-linked charter schools" to embrace the different roles that local nonprofits are playing. These founding roles include:

- leading the planning and design process;
- participating in community coalitions that plan and launch charter schools;
- operating the charter school; and
- providing various forms of ongoing support to the charter school.

The following examples capture the breadth and significance of these important and far-reaching developments.

In Milwaukee, WI... The Milwaukee Center For Independence (MCFI) will open the School for Early Development and Achievement in the Fall of 2001. MCFI, founded in 1938, is a nonprofit agency with the mission to assist individuals with special

needs to live and work in the community. It provides support to families and individuals affected by developmental delays, physical handicaps, and other conditions preventing inclusion or restricting personal independence. The charter school, a separately incorporated subsidiary of MCFI, will offer an instructional program for children, birth to 8 years of age, with emphasis on children with early onset developmental disabilities who will benefit significantly from early intervention. The educational program will be coordinated with strategies to facilitate access to all necessary programs and services to support the learning success of all students. The charter school will be closely linked with the other programs and services of MCFI, its affiliates and other community partners.

In Montrose, CO... the Passage Charter School was developed by the Delta/ Montrose Teen Pregnancy Prevention Initiative. The initiative, renamed Teaching Prevention, Promoting Involvement, is a department of the Montrose Memorial Hospital in Montrose, Colorado. The school serves the needs of students who are pregnant or parenting teens with core academics, job preparation, and parenting skills. A childcare center is located on-site. Staff of Teaching Prevention, Promoting Involvement led the charter school planning effort, mobilized broad community support for the effort, and currently provides administrative and other support services. Passage Charter School has been very successful in serving the needs of pregnant and parenting teens in this rural community.

In Chicago, IL ... the Noble Street Charter School enjoys a strong partnership with the Northwestern University Settlement House, a century-old social service agency operating in the uptown neighborhood. For years, leadership of the settlement house observed the regression of children who transitioned from the agency's Head Start Program to a public elementary school located in the same neighborhood. The

involvement with the charter school has been a way to address this problem. The charter school contracts with the settlement house for a range of management support services and uses facilities owned by the settlement house. Children enrolled in charter school participate in a number of support services provided by settlement house staff.

In Detroit, MI ... the YMCA Service Learning Academy in northwest Detroit is a charter

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school that offers classes for kindergarten through eighth grade. Close to 1,100 students attend this charter school, which is managed by Edison Schools. The school offers a comprehensive curriculum, character development and community service projects. Eventually, the YMCA Service Learning Academy will serve high school students as well. The Detroit YMCA's roots in education began in 1877. It founded the Detroit College of Law, the Detroit Technical Institute, and the Hudson School for Boys, and offered numerous vocational classes, teacher training programs, and English language instruction for newly arrived immigrant workers. The present leadership of the YMCA views the charter school as a continuation of the organization's commitment to the community.

In Boston, MA ... the Codman Academy Charter School, in partnership with Codman Square Health Center, is a new college preparatory charter high school that will serve the Dorchester neighborhood in Boston. The Codman Academy will open with 32 ninth graders in September 2001, adding one grade per year to reach 128 students grades 9-12 in the academic year 2004-2005. Utilizing a newly designed technology center at the Codman Square Health Center as well as facilities of the Codman Square Branch Library, the local YMCA, the Huntington Theatre Company and other partners, the charter school will provide technology-supported courses both on-site and online, athletics, arts, counseling, and internships in community service and work apprenticeships in surrounding communities. The Academy's educational program is based on Expeditionary Learning Outward Bound, a New American Schools design, and Codman will work with Virtual High School, which offers over 200 courses online.

In Phoenix, AZ ...Arizona Call-A-Teen has been providing education, job training and employment opportunities to youth ages 14-21, and some adults, since 1976. In 1995, it established the Center of Excellence Charter High School (COE), which, in 2001, enrolled approximately 150 students. Students work with staff to design an academic plan based on COE's competency-based, ungraded secondary curriculum design, which incorporates the State Essential Standards and SCANS (Secretary's Commission on Achieving Necessary Skills).

In Philadelphia, PA ... the YouthBuild Philadelphia Charter School opened in 1997. YouthBuild Philadelphia was established in 1992 under the national YouthBuild model. The charter school offers unemployed youth ages 18-21 a combination of academic skills, construction skills, job training and leadership development. The school serves about 200 students through a comprehensive program that focuses on five competency areas: communication skills, academics, construction, employability and attendance.

In Milwaukee, WI ... the YWCA Global Careers Academy Charter School, a wholly owned subsidiary of the YWCA of Greater Milwaukee, is now in its second year of operation. The Academy serves children

who are in pre-K through fifth grade with early exposure to a broad range of careers and professions including those that have not always been accessible to women and people of color. In addition to before- and after-school care, the YWCA offers a range of support services for both students and their families. Having shed its "swim and gym" programming years ago in order to focus on the economic empowerment of women and their families, the YWCA sees the charter school as a way to move "upstream" in the lives of the people they serve.

In Lawrence, MA ... the Community Day Charter School was founded in 1995 by the Community Day Care Center of Lawrence. The agency has been operating day-care and after-school programs since 1969. The charter school, with grades K-7, will grow eventually to be a K-8 school. The school was one of the first charter schools to be renewed for a second contract. Community Day Care Center manages the charter school and views it as an important way of providing support to the working families of Lawrence.

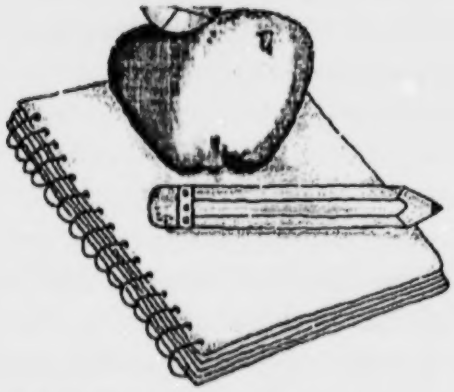
National Groups Offering Technical Assistance Within Their Networks

In many instances, the growth of CBO-linked charter schools at the local level is receiving a boost from a number of national nonprofit organizations that are actively promoting development of charter schools by their regional and local affiliates. Examples include:

YMCA of the USA. The YMCA of the USA is providing information and assistance to local YMCAs that are exploring charter school partnership options, or that simply want to learn more about the charter school development process and the role the YMCA could play. This initiative is part of the YMCA Strong Communities Agenda, a national strategy to give all YMCAs an opportunity to expand their work with children and families in low income, underserved and disadvantaged communities.

This latest focus on charter school development reinvigorates a long history of YMCA involvement in education. Beginning in the mid-1800s through the 1960s, YMCAs across the country operated hundreds of educational institutions including reading rooms, vocational and high schools, evening institutes, and manufacturing and trade classes. As a result of the YMCA's early work, 23 of those vocational and technical schools evolved into formal colleges and universities.

National Urban League. Founded in 1910, the Urban League is one of the nation's oldest and largest community-based movements devoted to empowering African Americans to enter the economic and social mainstream. The Urban League has local affiliates in over 100 cities. The organization has taken a formal position in support of public charter schools. Through its department of Education and Youth Development, the League has held a number of national meetings on the subject



of charter schools and serves as an information clearinghouse for affiliates that have interest in exploring and starting charter schools. To date, charter schools initiated by local Urban Leagues exist in several cities including Pittsburgh, PA; Springfield, MA; Canton, OH; San Diego, CA; Milwaukee, WI; and Detroit, MI.

National Council of La Raza. The National Council of La Raza (NCLR) is a private, nonprofit, nonpartisan organization established in 1968 to reduce poverty and discrimination, and improve life opportunities for Hispanic Americans. The Council has launched a comprehensive national effort entitled the Charter School Development Initiative. According to NCLR, the purpose of this initiative is three-fold:

1. to assist NCLR affiliates in developing the capacity to create and successfully operate charter schools that are linguistically and culturally appropriate and directly meet the unique educational needs of Hispanics of all ages;
2. to foster ongoing community development and empowerment on the part of affiliates by building and improving charter schools that are community-based and community controlled; and
3. to provide a mechanism to inform affiliates and traditional educational systems about best practices that effectively serve Latino student populations and English language learners.

The Council offers a well-organized support program with several components. Affiliates and other Latino CBOs may apply for planning and start-up grants; affiliates are also eligible for first-year implementation and follow-up operating grants in subsequent years. Small pre-development facilities development grants are available through the Raza Development Fund, a community development financial institution, as is facilities financing assistance — primarily via loans and lines of credit — for facilities acquisition, renovation, or new construction.

The initiative will also provide or arrange for on-site, intensive technical assistance for new and existing charter schools; offer national, regional, and site-based workshops and mini-conferences on critical issues relevant and unique to affiliate-operated charter schools; and offer a wide variety of national, regional, and localized professional development opportunities. Over the next five years, NCLR expects to be involved with the creation of up to 50 new affiliate and/or CBO-conceived and operated charter schools, while at the same time assisting in whatever form is needed or requested by the current 22 affiliate-operated charter schools in improving or expanding their existing programs.

City-Based Efforts ... The Case Of New Visions In New York City

In New York City, New Visions for Public Schools, a nonprofit with a long history of creating and supporting new schools, has viewed New York's charter school law as an exciting opportunity to apply its experience in the creation of small schools to assist parents, educators, community leaders, and others in establishing successful charter schools. New Visions has established the Charter School Assistance Center (CSAC) to provide resources that will combine New Visions' decade of experience with additional research, making critical information and technical assistance services available to new school leaders and others embarking on the road to creating, converting, and managing charter schools. The CSAC has published a step-by-step application guide that, while geared to New York charter schools, will prove useful to charter school organizers in other states. The guide is available online at http://www.newvisions.org/nyccharters/guide.html

Business-Linked Charter Schools

Another development that has relevance for charter schools founded by community-based nonprofits is the proliferation of business-linked charter schools. Sometimes called "employer-linked" charter schools, these are schools in which an employer organization or network joins with educational leaders in a collaborative partnership to develop and operate an educational program designed to prepare students for success in the work world. The knowledge and experience gained through these business-linked charter schools is readily available to other community-based organizations and charter school organizers. Recommended resources are available in Chapter 6.

Positive Impact Of CBO-Linked Charter Schools

Impact On Outcomes for Children

The most important benefit of partnerships with CBOs is the positive impact they bear on the social and academic achievement of students. While it would be difficult to make a direct correlation between partnerships and academic performance, there is some evidence of the positive effects of school-community collaboration. The Center for Youth and Policy Research at the Academy for Educational Development (AED) based in Washington, D.C. has conducted a national study of schools operated by community-based organizations. The schools, which include a number of charter schools, are referred to as "CBO schools." According to AED, these community-based organizations help students succeed because they bring several crucial assets to the operation of schools. These include:

- commitment to working effectively and intensively with young people who are most in need;
- access to community resources and services that support student learning

and provide for diverse educational experiences in school and in the broader community; and

- familiarity with the community's young people and families, and experience working with them on personal as well as community issues.[1]

The AED further states that the staff of CBOs that operate schools "strategically combine these assets with the expertise of caring, qualified educators to build schools which integrate positive youth development principles and effective educational practices to help students succeed."[2]

The Search Institute, based in Minneapolis, has also begun to document the positive

impact of community partnerships on student success. A framework of 40 developmental assets was first introduced in 1990 through a Search Institute report titled The Troubled Journey: A Portrait of 6th-12th Grade Youth. Since then the Search Institute has cumulatively surveyed more than 350,000 6th-12th graders in more than 600 communities to learn about the developmental assets they experienced, the risks they took, the deficits they had to overcome, and the ways they thrived. The presence of these assets in the lives of young people results from the interplay of parents, schools, religious organizations and community agencies. According to the Search Institute:

Youth development programs in community centers, Ys, parks, and other settings have tremendous potential for providing children and youth with experiences and opportunities they need to grow up healthy, competent, and caring. These programs support, guide and challenge young people as they venture beyond their families and immediate neighborhoods into an ever-expanding world of friends, opportunities and other influences. Perhaps most important, however, these programs provide opportunities for young people to interact with caring adults and to form positive relationships with their peers. The evidence continues to mount for recognizing youth development opportunities as essential for young people's healthy development—not as nice additions if extra resources or time are available.[3]

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[1] CBO Schools: a History of High Standards for All, Issue Brief II, published by the Academy for Educational Development, Fall 2000.

[2] Ibid

[3] The Search Institute. http://www.search-institute.org.

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Impact on Organizational Strength of the Charter School and the Community-Based Nonprofit Organization

For charter schools that exist in partnership with a CBO, there are a number of benefits. They can tap into the community ties and reputations of nonprofit organizations that, in many cases, have deep roots in the communities to be served by the charter schools. They can realize cost savings through shared staff and facilities. They are able to take advantage of the marketing, public relations and fundraising expertise of the founding organizations. Charter schools can also take advantage of the established banking relationships of the founding nonprofits when it comes to obtaining capital. In some cases, they receive direct subsidies from the founding organizations during critical start-up years.

In addition to financial resources, community-based nonprofits may also possess considerable management expertise that can be invaluable in the key start-up phase of a charter school as well as in dealing with many on-going operational issues. This expertise includes strategic planning, customer service, outcomes and performance measurement, continuous quality improvement of programs and services, personnel management, public relations, utilization of technology for training, public relations, fund-raising and other critical functions.

At the same time, the partnerships have proven beneficial to the founding organizations. When linked with charter schools, nonprofits wishing to have a positive impact on education experience new freedom from the layers of bureaucracy and regulation that historically have been associated with traditional district public schools. Charter schools also offer flexibility in structuring staffing relationships between employees of the founding organization and the new charter school. Finally, involvement with new partners has spurred creativity and innovation in youth and family programming by the nonprofits. Below are some examples.

Noble Street Charter School. The Northwestern University Settlement House's credit rating and access to a network of influential supporters enabled the Noble Street Charter School to borrow $2.5 million in tax-free bonds and raise another $2 million in donations to complete a new building. The settlement house also takes care of Noble Street's accounting, payroll, and budgeting, freeing the educators to focus on academic planning, discipline and teaching. The linkage to the charter school has provided the settlement house with new opportunities to make its programs and services more accessible to the children and families served by the charter school.

YWCA Global Career Academy. The YWCA of Greater Milwaukee utilized its considerable knowledge and skills in areas such as facilities construction and capital campaign fund-raising to finance the purchase and remodeling of a former private Montessori

school into facilities that now house the YWCA Global Career Academy Charter School in Milwaukee. In addition, staff of the charter school received in-service training in a range of quality improvement, customer relations and planning skills that will enhance their effectiveness in the charter school and as employees of the YWCA as well. The linkage to the Global Career Academy has enabled the YWCA, at a much earlier stage, to build a foundation for future social and economic empowerment in the lives of the girls and young women the agency exists to serve. The YWCA believes that this earlier intervention will increase the impact of other programs and services offered later to these same women.

The positive benefits of the CBO-charter school linkages are further borne out in a review of 14 charter schools in Massachusetts. "Three of the 14 schools operate under the auspices of community-based agencies.... The schools benefit from the founding agencies' standing in the community, organizational stability, and articulated mission: a history of agency contribution to the community gives the school day a measure of "insider" status. Various support systems are in place for school administrators, students, and the students' families. Agency board members bring experience to the school board and commitment to the agency's mission — from which the school takes its own. Deep roots in the community ensure a level of trust in the school from the start and work to allay any concerns community members might have about the school's impact on the community."[4]

Partnership Building Challenges

This guide is organized around a number of partnership building challenges, each of which is the subject of a chapter. The strongest partnerships encountered in conducting research for this guide demonstrate success in addressing these challenges:

Why enter into a partnership to plan and operate a charter school together? Why does a community-based organization want to get involved in developing a charter school or in playing a key support role? Why do charter school organizers sometimes make the decision to pursue a community-based nonprofit as a partner during the start-up process?

How will we go about planning the CBO-linked charter school together? Once the decision is made to work together, how do the partners plan the charter school?

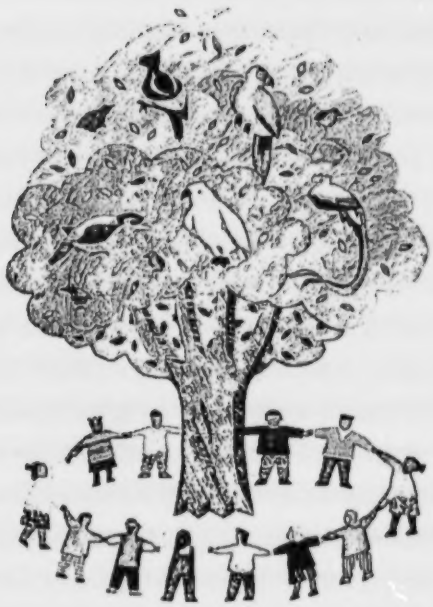
How will the partnership be structured? What kind of a partnership will be developed? What will be the legal, financial and governance arrangements? Who will be responsible for what? What will be the

[4] Ciffolillo, Kathryn, and Wolf, Rebecca, Renewal Findings: A Review of the First Fourteen Massachusetts Charter School Renewal Inspection Reports, Massachusetts Charter School Resource Center, 2000.

nature of the partner organization's involvement in the charter school? How will staff supervision take place?

How can the partnership be strengthened and sustained? What strategies and practices can strengthen and sustain the partnership between the community-based founding organization and the charter school? With respect to partnership effectiveness, what works well?

What resources are available for developing and sustaining CBO-linked charter schools? What publications, sample documents, helpful organizations, and other re sources are available to provide assistance to CBOs and charter schools?



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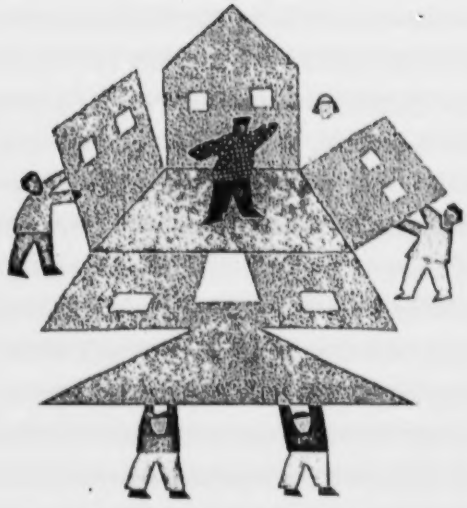
Chapter Two: The Decision To Start A Charter School



Partnership Building Challenge: Why Does Your Organization Want To Start a Charter School?

In this chapter, we offer examples of why community-based nonprofits are getting involved in the start-up of charter schools. Six pre-planning activities that have been shown to lay a solid foundation for future success are discussed. A list of questions that can serve as a guide for pre-planning information gathering is provided. We conclude with a summary of major charter school start-up activities.

An Idea Whose Time Has Come: What Motivates A Community-Based Nonprofit Organization To Start A Charter School?

The growing appeal of charter schools among CBOs can be best understood by examining the motivation of organizations that have decided to launch a charter school.

In every case, nonprofit organizations surveyed for this publication saw the operation of a charter school as a way to increase dramatically the impact of the programs and services for the children and young adults they existed to serve. A number of organizations stated that the motivation to start a charter school, or to play a support role in a charter school start-up, grew from the frustration of only having contact with children for a few hours on the weekends or late afternoons or early evenings. They wanted a way to have more direct impact on children's daily lives. In other cases, the organizations were not satisfied with the level of education

provided by existing schools and wanted to have more direct impact on education and school reform.

Here are some examples that reveal common reasons community-based organizations are starting charter schools:

Passage Charter School. In Montrose, Colorado, the Teen Pregnancy Prevention Initiative (TPPI) was founded in 1993 to deliver case management services to pregnant teenagers in a small rural community. The organization had great difficulty tracking down young women, most of whom were not in school and in fact had not been in school before they became pregnant. This challenge limited the success of TPPI's services. At the same time, the organization experienced difficulties in attracting funds for services to pregnant teens. It saw development of the charter school as a way to provide educational and support services responsive to the needs of pregnant teens, and at the same time, to attract new dollars for educational programs that would benefit its target population.

YWCA Global Career Academy. Years before Wisconsin's charter school law was enacted, staff of the YWCA of Greater Milwaukee were alarmed at the high rates of student suspension and expulsion in Milwaukee Public Schools. The YWCA considered developing an alternative middle school to be operated at one of their community sites. More recently, through its training of low-income women for careers in the building trades, the YWCA encountered many women who lacked sufficient math skills. These same women also said that they were not encouraged in school to consider nontraditional careers. In response, the YWCA considered starting a school for girls and young women that would emphasize nontraditional career opportunities. When the charter school law was strengthened, the time was right for the YWCA to seize this new opportunity to meet the educational needs of girls.

YMCA Service Learning Academy. In 1994 a new CEO arrived at the YMCA of Metropolitan Detroit with a vision for revitalizing the role of the organization including a strong focus on education. For many years, the YMCA had been involved in providing after-school and latchkey programs at area schools. What was missing was a way to have impact on children during the most significant part of their days — the six to eight hours each day the children spent in school. A charter school would provide a new way for the YMCA to get more deeply involved in the lives of children and in the life of the community as a whole.

Community Day Charter School. In Lawrence, Massachusetts, Community Day Care had been providing early childhood programs for over 25 years. It seemed like a natural progression in serving children to establish a small private independent school that would serve the community. They were successful in keeping the tuition low, but many families in the community still couldn't afford to enroll their children in the school. At the same time, more and more families from the suburbs were sending their children to this well-regarded

school. The parent body was unwilling to provide scholarships to financially strapped families. Community Day Care finally decided to close the school in 1995, the same year that the first charter schools in Massachusetts opened. The organization's experience in running a school and using public money positioned them well to pursue a charter school start-up.

Raul Yzaguirre Charter School for Success. In Houston, the public school system was failing to meet the educational needs of Latino children. The Tejano Center for Community Concerns, an organization serving the East End neighborhoods of Houston, was especially concerned about the high dropout rate and the increase in gang activity. The Center saw, in the passage of the Texas charter school legislation, an opportunity to take action and provide for the educational needs of its community.

Noble Street Charter School. Charter school organizers and community-based organizations sometimes happen upon each other simultaneously. This was the case with the Noble Street Charter School in Chicago. The co-founder and current principal of Noble Street Charter School first came to the executive director of the Northwestern University Settlement House, with the question "Do you have any idea where we can find a facility for our charter school?" The executive director replied, "Why not here?" The Northwestern University Settlement House had always been interested in a more formal educational program component, seeing education as a key to the success of the children they work with. Staff noticed that children who came out of the settlement house Head Start program would begin to regress when they moved on to the elementary school in the neighborhood. At the same time, the principal was looking for the facilities expertise of an established nonprofit leader.

For organizations that may have considered development of a private school or a contract alternative school within a traditional public school district as well, the charter option has proven more attractive for at least two reasons:

- virtually every charter school founded by a pre-existing community-based nonprofit identifies low-income families as their primary customers; and
- charter schools, which by law don't charge tuition, are simply more accessible to low-income and working families who can't afford private school tuition.

Other nonprofit organizations concluded that the charter school option would give them more independence from the traditional education bureaucracies and therefore make it easier to innovate.

Pre-Planning: The Process Begins . . .

As knowledge of the charter school movement increases, more and more community-based nonprofits will consider development of a charter school. How does the process begin? The idea initially surfaces in one of three ways: First, the Executive Director or CEO of the nonprofit

organization, either alone or in discussion with other staff, begins to think about charter school development as an option. At some point, the Executive Director brings the idea to the attention of the Board of Directors for support, feedback or both. In the second instance, interest in a charter school start-up first surfaces at the level of the board. If the idea seems to have merit, the Board of Directors will encourage the executive staff to explore the idea further. In the third start-up scenario, a charter founding group approaches the community-based organization with a proposal or initiates an exploratory dialogue.

In this early exploration, consider the following pre-planning activities based on the experience of other nonprofit organizations that have been involved in charter school start-ups.

Get Educated About Charter Schools

Charter schools are still relatively new to the American scene. Gather information to deepen your own understanding. It is important to learn the answers to the following questions:

- What is a charter school?
- What distinguishes a charter school from other schools, both public and private?
- How does a charter school come into being?
- What is the process for starting a charter school?

There are a variety of resources that can be tapped to answer these and other questions:

- state and local charter school technical assistance organizations, including charter school resource centers and membership organizations;
- charter schools that are up and running in your local community and region;
- a variety of Web-based resources; and
- several excellent "how-to" guides on every aspect of planning and operating charter schools have been published by Charter Friends National Network and other state, regional and national support organizations.

Chapter 6 of this publication includes an annotated list of such resources. The Charter Friends National Network keeps an up-to-date state contacts page at www.charterfriends.org/contacts.html.

Gathering Information Checklist

The following list of questions can serve as an outline for this pre-planning information gathering about charter schools.

Formal State and Local Requirements

- How do we get chartered, and from whom do we seek a charter?
- What are the costs in time and money of pursuing and gaining the charter?
- How much paperwork do we have to do?
- What regulations must we follow?

Marketing and Recruitment

CBO-linked charter schools, like all charter schools, have to develop a plan for marketing their particular comparative advantage to parents and students. The following types of questions need to be confronted and resolved:

- What do parents and students care about?
- What educational opportunities are being sought or are needed by the community?
- Is there a demand or need for the school? How do we know?
- Why should parents and students buy into our learning vision, and how do we reach them?
- Are we competing with, or offering a "product" complementary to, other schools in the community and region?
- What type of student body do we want to have, and from where do we want to draw our students? What are the specific needs of this target population?

Financing and Facilities

- How do we pay for the new school, especially the start-up costs and planning time?
- What costs can be absorbed by partners in the school?
- What institutions and resources are available in the community that can assist us?
- Will any of the current funders of the founding organization financially support the charter school's planning, start-up and on-going operation?
- Are we going to use existing facilities for this school, or are we going to create wholly new ones? How will we finance any needed purchase, construction, or renovation?
- Are we going to use business sites or the facilities of community institutions?
- How do we manage the resulting relationships?

Paperwork, Accountability, and Evaluation

- Where can we go to get help meeting these requirements?
- How do we go about meeting state testing and performance requirements as well as our own performance expectations?
- How are we going to evaluate ourselves?
- How can we fit state standards together with our own?

Competition

- How are other schools going to react to our presence?
- What are other charter schools in the area offering?

Engage Staff and Board Members in a Thorough Discussion

Take the time to engage in internal dialogue with other staff and board members. Even for larger organizations, the development and operation of a charter school is a major undertaking. It's much more than simply adding a new program. It will require new knowledge and skills, added organizational capacity, and significant expansion of the organization's budget. The addition of the charter school will change the organization. Important issues to discuss include:

- Do people understand what a charter school is?
- How do they feel about the idea of starting a charter school?
- Is the operation of a charter school consistent with the mission and goals of the founding organization?
- Is there a need for the kind of charter school we are envisioning in the community we serve?

The National Council of La Raza's Charter School Development Initiative has developed two excellent resources for initiating this internal dialogue: "Are You Ready to Begin the Charter School Planning Process? A Self-Assessment to Determine Readiness" and "So You Want To Start A Charter School." See the Charter School Development section of Chapter 6.

Reach Out to External Stakeholders

As important as internal dialogue is, it is also critical to engage external stakeholders, partners and other supporters of the founding organization. Meet with key individuals and organizations to explain what charter schools are, why the nonprofit organization is considering a charter school start-up, and most importantly, listen for suggestions, concerns and questions. These early contacts can lead to commitments to participate in planning, provide funding and other resources, as well as help build broader community support for the charter school. The Teen Pregnancy Prevention Initiative, founder of Passage Charter School in Montrose Colorado, used these early contacts to assess community feeling about a charter school that would serve pregnant teenagers. These early contacts led to strong community support and the personal involvement of civic, business, and educational leaders in the charter school planning process, and in implementation as well. Some of these leadership contacts serve on the board of the charter school today.

Assess Organizational Capacity

Another important early step is to assess the organizational capacity to undertake a charter school planning process. To help with your evaluation, ask the following questions.

Do we have the resources and expertise needed to develop and operate a charter school? If not, how will these resources and expertise be secured?
Successful nonprofit organizations already possess a number of skills needed to start a charter school: public relations, marketing,

fund-raising, budget and financial planning, personnel management including volunteer program development, and many others. Charter school development, however, requires additional skills and knowledge in areas such as: curriculum, instruction and assessment, instructional technology, special education, school finance, and federal and state charter school legislation and regulations. In addition, project management has been cited as a critical skill area given the complex nature of charter school design and operation.

Are we prepared to make the major commitment of time necessary to successfully launch a charter school?
Staff of several of the charter schools surveyed mentioned that their involvement in the charter school planning process took more time than they originally anticipated. Several of the organizations indicated that because of the amount of time required, it was a real advantage to have staff who were able to work full-time on the planning process.

Give Some Early Consideration to How the Relationship Between the CBO and the New Charter School Will Be Structured

When do we determine what the structure of the CBO-charter school partnership will be? It can be a case of the "chicken or the egg." In some instances, a determination about the relationship between the founding organization and the new charter school might be made before the planning process begins. Applicable state charter school legislation, structural preferences of the founding organization and other factors may dictate the course of action. In other instances, a number of structural options will be identified and considered later in the planning process in light of decisions that have been made about school vision, educational philosophy and other matters.

Chapter 4 of this guide offers information and guidance on how to structure the CBO-charter school relationship. A number of critical questions are included to help reflect on this important issue. A "Partnership Continuum" is presented which delineates four structural options. At one end of the continuum, the founding organization retains a high degree of control over the charter school. As we move along the continuum, the charter school's degree of independent authority increases as the founding organization's influence decreases. Some of the suggestions and guidelines in Chapter 4 will help the charter school planning committee begin to think through this critical topic.

Determine How Planning Decisions Regarding the Charter School Will Be Made

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It is also important to determine how decisions regarding the charter school development effort will be made.

- Who will be involved?
- What will be the nature of their involvement?
- What are the key decision points?
- What are the expectations of the founding organization board regarding information and involvement?
- Will outside stakeholders be involved in any aspect of the decision-making?

To a great degree, the decision-making regarding the charter school will reflect how the nonprofit organization makes major decisions about anything else. It will also reflect the governance philosophy of the organization. Among nonprofit organizations, there is great variety: in some organizations board member involvement in details of the planning process would be a shared expectation; in other nonprofits, similar involvement would be regarded as micromanaging.

It will be imperative to determine which organization will have primary responsibility for leading the charter school planning process, especially in instances where the process is a collaborative effort involving other partners.

Make a Decision

After completing these pre-planning steps, it's time to make a decision: Should your organization move forward with the planning for a charter school?

- Do you have an understanding of what a charter school is and do you understand the process for starting a charter school in your community?
- Does it make sense for your organization to be involved in a charter school start-up? Is this major undertaking in basic alignment with your organization's mission and strategic plan?
- Will the development of a charter school enable your organization to better serve children in your service area?
- Have members of your board, staff and key stakeholders received a thorough orientation to charter schools and have their major questions and concerns been addressed?
- Have you thoroughly assessed the internal organizational capacity needed to plan and possibly operate a charter school and, based on that assessment, do you believe that you have the necessary skills and knowledge or that you can acquire them?
- Does your charter application have a reasonable chance of receiving approval?

Start-Up Phases

Phase	Activities	Recommer
Phase 1 Exploration: surveying the scene and laying the groundwork	Exploring reasons for choosing to start a charter school, gathering basic background information on charter schools in your state, and assembling a school design team and framework.	✔ Investig ✔ Review ✔ Assembl ✔ Design
Phase 2 Application: drafting, presenting, and getting the charter approved	Writing and negotiating the terms of an actual charter document and applying to a charter-granting agency for approval.	✔ Draft th ✔ Review t charter ✔ Build co ✔ Attend

Will the public funding available to your charter school make it viable financially?

If you answered "yes" to these questions, you're ready to begin the planning process

Summary of Major Charter School Start-Up Activities

Though the specifics vary widely from state to state, charter school developers in many states proceed through several common stages in their school development process (see table below). The process is discussed in greater detail at http://www.uscharterschools.org/pub/uscs_docs/ta/steps.htm.

Chapter Three: Planning A New CBO-Linked Charter School

Partnership Building Challenge: How Will We Plan the CBO-Linked Charter School?

In this chapter, we offer guidance on how to structure the charter school planning process. Once again, we draw on the experience of community-based nonprofits. We provide a sample planning process outline that can serve as a starting point for designing a planning process that will meet your needs. We also offer a number of other suggestions and considerations that can enhance your charter school planning efforts.

The Planning Process Begins

You've given the matter careful thought. You've made a commitment to plan for the development of a new charter school. The planning process now begins in earnest. In order to lay the groundwork for success, put some careful thought into the question "How will we go about planning the charter school?" The experience of charter school organizers interviewed for this publication suggests that a well-designed planning process will prevent a range of charter school start-up and partnership-building problems from arising later.

Here are some helpful guidelines drawn from the experience of CBOs that have developed and launched new charter schools in recent years.

Determine the Planning Philosophy and Approach

Determine what kind of planning process will be used. How you intend to go about planning the charter school should, in some way, reflect the kind of school you envision. For example, if the school is viewed as a community-based educational institution, then community members need to be involved in its development. If you expect strong commitments from supporting partners, you'll need to involve them in meaningful ways. If yours is a vision of a school that truly empowers young people,

then how will young people be involved in its creation? Real participation in planning leads to real commitment later on.

Also think about how long you expect the planning process to take. The experience of other charter schools, including those developed by founding nonprofit organizations, suggests that the planning will take at least a year and probably longer. Even with the resources and expertise of an established nonprofit organization, facilities remain a major challenge for new charter schools and can delay the opening of the school.

These and other considerations will determine how the planning process unfolds and how members of the planning committee will be involved.

Organize and Convene a Planning Committee

The first step in launching the planning process is to organize and convene a planning team. Such a group may have already formed in the earlier preplanning phase described in the previous chapter. Now it's time to solidify the group that will be responsible for developing the detailed charter school plan and application for charter school status. As with any critical committee, it will be helpful to develop a written committee description, a one-page summary that includes the committee purpose, composition, responsibilities, and timetable with critical deadline dates. Many of the specific committee responsibilities will be determined by the requirements of the charter school authorizing body to which you expect to apply.

Make sure the planning committee is inclusive of key internal constituencies. Beginning with the staff, go wide in your thinking about who should be involved. There are several benefits: You can better tap the experience and knowledge of staff regarding the needs of children who will attend the charter school, their families, and the community as a whole. Early involvement also lays the groundwork for deeper staff understanding and support of the charter school. This level of staff support will be especially important if the proposed charter school is closely connected structurally and programmatically to the founding organization.

Also give special thought to the involvement of the board of directors in the planning process. The board, in keeping with its governing role, will be thinking about questions like: Is the charter school in alignment with the mission and strategic plan of the organization? What is the legal and financial liability of the nonprofit for the charter school? Does the organization have the internal capacity to undertake a charter school? What will be the response of key external stakeholders, especially funders and political leaders?

The actual form of the board's involvement will depend on the governance model, philosophy and style of the nonprofit organization. Depending on the approach to governance, board directors may or may not serve on the charter school planning

committee. In some instances, program design and implementation will be delegated to staff. In any case, check with board leadership about their expectations regarding information and reporting. Then determine how the board of directors will be kept apprised of progress. For guidance in this matter, consider the usual practices for providing the board with information when the organization is contemplating any major new program or initiative.

If external partners will be involved in the planning, determine the nature of that involvement and the desired working relationship. In the spirit of true partnership, discuss with the external partners what their expectations are for working together. If you intend to involve external constituencies in some way and they are not currently represented on the charter school planning committee, consider expansion to include ones that are key to the vision of the charter school that has emerged thus far. A diverse mix of planning committee members can also help to assure innovative thinking. It has also been helpful to pose the question: "What qualities do we want this joint planning process to have?"

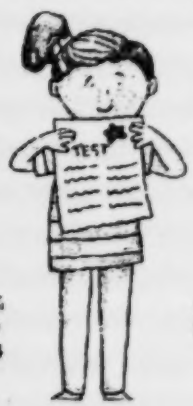
The East Bay Conservation Corps took a unique approach to the development of their charter school planning committee. They convened a national design team composed of 15 individuals from around the country. The team included four heads of independent schools, one of whom was from California, local community leaders, university-based school assessment experts, some members of the East Bay Board of Directors, as well as the Executive Director. Team members were paid a stipend for participation. In the first year, they designed the curricular framework for the school. In the second year, they focused on governance policies and job descriptions.

In developing the charter school planning committee, give special consideration to size. It is important to strike a balance between the need to have a committee of manageable size while also striving for inclusiveness and a good mix in terms of expertise which can tend to increase the number of committee members.

You will find a sample flyer for recruiting individuals to serve on the Charter School Planning Committee at http://www.uscharterschools.org/gb/community/interest.doc

Reach Out to Key Internal and External Constituencies

Outreach to key internal and external constituencies will have already begun in the development of the charter school planning committee itself. To assure that the new charter school is responsive to the needs of the children it hopes to eventually enroll and the needs of their families, it is important for the planning committee to determine how information about needs and service expectations will be gathered from these key constituencies. The primary focus will be on potential students and



their families. In addition, the needs and service expectations of other constituencies must be thoroughly understood. In addition to children and parents, these constituencies may include educators, business and community leaders, and political leadership, as well as other youth- and family-serving organizations and agencies in the community. The emerging vision of the charter school may dictate contact with other groups.

If these constituencies are already represented on the charter school planning committee from the start, their voices will be reflected in the planning process. At the same time, there is great value in doing further listening and information gathering through other means. Staff of Community Day Care, founder of Community Day Charter School in Lawrence, MA, made sure all stakeholders in the city understood why they were pursuing a charter school start-up. They interviewed nearly 50 individuals including the school district superintendent, the mayor, state legislators, parents, and others. They also conducted neighborhood meetings throughout the city. They asked questions like: "What is your dream for effective schools? What are you presently not getting from schools?"

Without question, surveys and focus groups are among the most powerful means to gather such information directly from people in the very community to be served by the charter school.

The Silver Spring Neighborhood Center in Milwaukee conducted a series of focus groups early in its charter school planning process. The following groups were each invited to attend focus groups: middle school-age students, parents, educators, program staff of the Silver Spring Neighborhood Center, community and business leaders, and leadership of the residents' council from the public housing development in which the Center's facilities are located. In addition, a focus group was held with the League of Martin, an association of African-American police officers who were early supporters of the charter school because of their experience with area youth, many of whom were being failed by area schools.

In the focus groups, participants were first asked to reflect on the following questions: What is currently missing from available educational offerings in our community? If you could create the school/learning opportunities of your dreams, what would this look like? Then they were asked to respond to the following set of questions:

- What would students learn?
- How would learning take place? How would the "school day" be organized?
- What would the relationships between students and educators be like?
- What would the relationships between school, community and employers be like?
- What other suggestions would help develop a charter school that would really meet the needs of today's students and prepare them for the future in which they will live and work?
- What else would it take to create a school that was not only a great place

for children but also a great place to work?

This series of focus groups was beneficial for a number of reasons: first and foremost, it provided the planning committee with fresh insights about the needs, concerns and expectations of these key constituents regarding the charter school. The focus groups also served to inform a wider circle of individuals and groups about the charter school planning project. Excitement and interest grew as a result of this new information leading, in some cases, to offers of assistance and support. Finally, the information gathered was helpful in further developing the vision of the charter school, determining details of the educational program, as well as designing a network of youth and family support programs for the charter school. For more on how the results of the focus groups can be used in developing a vision statement, see below.

In addition to focus groups and surveys of key constituents, you can also check for data about the social and educational needs of children in your community that has already been compiled by others. Some examples include studies, market research, and needs assessments conducted by educational reform organizations, the United Way, the school district, and others. Search the Web for additional data.

The YWCA of Greater Milwaukee utilized a "search conference" to involve key internal and external constituents who were not on the core planning committee but whose input would strengthen the charter school design. A search conference is an interactive planning process that brings together diverse constituencies around a key question or issue. In the case of the YWCA charter school search conference, the following question was used: "What should the characteristics of the YWCA Charter School be if our vision is to create a learning environment that provides our children with the social and educational experiences and supports needed to pursue professions not customarily open to women and people of color?"

The conference was led by specially trained facilitators. The 36 participants represented six constituent groups that included students, parents, educators, community resource organizations, YWCA board members, and YWCA program staff members. The group met for 2 1/2 days. The resulting vision and charter school design framework provided guidance, inspiration and future resource commitments to the charter school planning committee. For more information about the search conference approach, go to: http://www.futuresearch.net/fsconference/.

Key Considerations in the Planning Process

Given the diversity of the nonprofit sector and the partnerships between founding nonprofits and charter schools, there is no one planning model that will work in every case. Based on the experience of the charter schools interviewed for this publication, a successful planning model will incorporate guidelines offered previously. To summarize, the actual design of the planning process will depend on the following factors, some of which will be addressed in more detail in future chapters:

- The governance and management philosophy of the charter school: when it comes to developing a major new program, what is understood as the role of staff and the role of the board? Will the board be involved in the actual planning or approve the charter application before submission to the charter granting body?
- Is the nonprofit the sole initiator of the charter school planning effort or has the nonprofit been joined at the outset by a group of charter school organizers wishing to plan collaboratively with a community-based nonprofit?
- Are there other major partners who have committed to the planning effort before the process has even begun, or will involvement of major partners be sought later in the planning process?
- Does the nonprofit organization intend to contract with an educational management firm that will provide educational and administrative services to the charter school board?
- From the outset, does the nonprofit intend to operate the charter school as a major program with its own staff, or "spin off" the charter school as a freestanding entity after start-up? (The options available will be determined, in part, by charter school legislation in your state.)
- What are the specific requirements of the charter authorizing body to which the application will be submitted?
- Has it been determined that the charter school will incorporate a full-service approach, providing a range of support services for children and families, or will the charter school focus primarily on providing educational programming?

Referenced in Chapter 6 is one example of a planning process utilized in the development of a charter

A Word About Shared Vision: Getting to "We"

One of the important lessons learned from the very start of the charter school movement is that a shared vision of the school is the centerpiece of successful planning and implementation. Things are no different in the case of charter schools founded by pre-existing nonprofit organizations. In the nonprofit world, strategic planning has gained wide acceptance over the last 10 to 15 years. The importance of shared vision in successful strategic planning is generally understood. At the same time, development of a shared vision is seen as the critical ingredient in forging successful partnerships, collaborations and alliances.

No matter what planning model is utilized, make sure adequate time is given to the task of developing a shared vision for the proposed charter school. Once again we can draw on the experience of the Silver Spring Neighborhood Center. The wording of questions used in the focus groups was purposely selected to encourage people to think in visionary terms: "If we could create the school of our dreams, what would it look like?" The results of the focus group meetings were used to develop a charter school vision statement that incorporated the dreams of all key stakeholders — parents, students, staff, educators, business and community leaders, youth and family serving agencies, and others. The resulting sense of ownership laid the groundwork for commitments to remain involved. A Web site linking to a sample "Charter School Vision Statement Worksheet" is included in Chapter 6.

Other Suggestions and Considerations for Planning

Invest the Time to Develop Strong Relationships between Key Individuals

In the case of Northwestern University Settlement House of Chicago and founding educators of Noble Street Charter School, the executive director and the school principal had many conversations about educational philosophy, expectations for the partnership, and related issues. This time together laid the foundation for a relationship that remains very strong. Both individuals credit the strength of this relationship in helping them work through issues and challenges along the way.

Utilize the Resources Available From Charter School Support Organizations in Your State

Here's the great news! In states that have charter legislation in place, there are charter school support organizations offering technical assistance to nonprofits wishing to develop a new charter school. These organizations are familiar with the specific requirements of charter school legislation in each state, and understand the impact of such legislation on structuring the partnership between the nonprofit and the new charter school. They can offer guidance in drafting the charter application and supporting documents. They can suggest

curriculum, instruction and assessment resources. They can also offer assistance in addressing some of the most challenging design issues facing charter school organizers such as facilities, special education, and accountability.

In addition to these state-based organizations, there are several national resources including http://www.uscharterschools.org, a major Web site hosted by the U.S. Department of Education. There you'll find links to virtually all of the other available Web-based resources on charter school development. There are many downloadable resources including planning guides, charter applications, and other sample documents. Among the many excellent resources on this Web site, you will find "Steps to Starting a Charter School"[5] which provides an overview of several common stages in the charter school development process, along with numerous helpful resources for starting a charter school. Charter Friends National Network at http://www.charterfriends.org is another excellent resource. Over the last several years, Charter Friends has published a wide range of resource guides on all aspects of charter school development and operation. See resources in Chapter 6.

Link Child and Family Support Services to the Charter School

A number of charter schools interviewed for this publication have been organized in such a way as to formally link non-educational support services to the charter school. The Village Charter School founded by Mercer Street Friends in Trenton, NJ, the School for Early Development and Achievement founded by the Milwaukee Center for Independence, Community Day Charter School founded by Community Day Care in Lawrence, MA, and the Noble Street Charter School founded by Northwestern University Settlement House in Chicago are among the growing number of charter schools organized in this manner.

This approach is sometimes referred to as "full service schools." Joy Dryfoos, with the 1994 publication of her book Full Service Schools, highlighted this growing trend. The concept of a full service school is based on the belief that schools can promote academic success only when students are ready and able to learn. The ability of children to learn in school is affected by many outside influences, such as poverty, family instability, parental unemployment,

[5] uscharterschools.org/pub/uscs_docs/ta/steps.htm

child abuse, teen pregnancy, and substance abuse. Although schools alone cannot overcome all of these influences, schools can serve as a hub for the delivery of services that complement and support education by addressing the wide range of problems students and families may face.

Such school-linked integrated services, located at or near the school, provide an array of benefits to enable all students to learn and achieve to their fullest potential. Community-based nonprofits, especially those that are already providing such support services to children and families, are well positioned to create full service charter schools. If it is the intent to develop such a charter school, then the charter school planning process will need to be designed accordingly. Chapter 6 lists several resources for integrating support services into the school design.

Contracting With Private Management Firms and Comprehensive School Reform Organizations

As the number of charter schools continues to increase throughout the country, it has become a common practice for some charter school governing boards and founding groups to contract with private companies to provide educational management services. This can be an attractive option for CBOs that may possess the general management, financial, programmatic, and facilities know-how to design and operate charter schools but feel they lack the educational background and expertise.

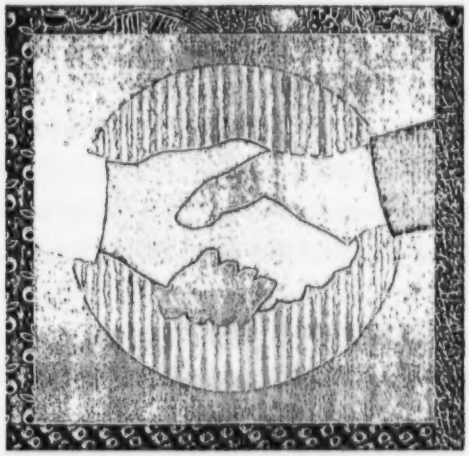
Charter Friends National Network (CFNN) has published Charting a Clear Course: A Resource Guide for Building Successful Partnerships between Charter Schools and School Management Organizations. According to authors, Bryan Hassel and Margaret Lin, "To make contractual relationships work well, charter school boards need to strike an effective balance between (1) fulfilling their public obligations to govern the school responsibly; and (2) giving contractors the freedom to handle school affairs without micro-management from the board." Drawing on the experiences of charter schools nationwide, this resource guide, the only one of its kind, can help Charter School Planning Committees structure stable, productive relationships with school management organizations. It identifies key issues, highlights options, and presents questions to consider in critical areas. The resource guide is available on CFNN's Web site at http://www.charterfriends.org/contract.pdf

In addition to contracting with companies for educational management services, another option available to charter school organizers is to contract with groups that

have developed comprehensive school reform models—well-researched and well-documented designs for school-wide change that are supported by expert trainers and facilitators.

As an alternative to designing curriculum and instructional strategies from scratch, it is possible to utilize a comprehensive school reform model that is in alignment with the mission and goals determined by the charter school organizers. Federal funding to help charter schools adopt these school reform models is available through the Comprehensive School Reform Demonstration (CSRD) program as part of the FY1998 Labor-HHS-Education Appropriations Act. Once again, Charter Friends National Network has published a resource guide on the subject entitled If the Shoe Fits: A Guide for Charter Schools Thinking About Adopting a Comprehensive School Design, available online at http://www.charterfriends.org/shoefits.html

For more information about these educational contracting options, view The Landscape of Educational Contracting Helpful Resources at http://www.uscharterschools.org/gb/community/landscape.doc



Chapter 4: Structuring the Partnership

Partnership Building Challenge: How Will The Partnership Be Structured?

In this chapter, we explore the different types of relationships between founding nonprofit organization and charter schools. We also examine some of the tools and techniques that are being used to define roles and relationships among the founders and schools.

CBO-Linked Charter Schools: A Partnership Continuum

The partnership arrangements among the founding organizations and charter schools interviewed for this publication lie along a continuum. At one end of the continuum, there is a very close relationship between the founding organization and charter school. No legal separation exists. The founder and charter school are one and the same organization. The charter school is treated as a major program of the founding nonprofit. Staff of the charter school are employees of the founding organization. The founding organization's executive director or designee supervises the principal or head of the school. Sometimes the founding organization has chosen to establish the charter school as a subsidiary corporation still maintaining a strong degree of control.

Toward the other end of the continuum, the charter school exists as a separate and distinct legal entity, often an independent nonprofit corporation. In most cases, this separation is mandated by the charter school legislation. The staff who work in the charter school are employees of the school, not the founding organization. At this other end of the continuum, the relationship between the founding organization and the

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charter school can range from a spirit of cooperation with little formal interaction to one in which there are many formal linkages. In some instances, the relationship will become less formal after the school opens and has been in operation for a time.

The four partnership types described on the following pages are offered as an illustration of the range of options available for structuring CBO-linked charter schools. The intent is not to imply that there is more order or predictability than actually exists in this rapidly evolving field. There can also be variations that include a mix of characteristics of these basic types.

THE PARTNERSHIP CONTINUUM AT A GLANCE

Please note: In the first partnership type at the left end of the continuum, the founding organization retains a high degree of control over the charter school. As we move toward the right, the charter school's degree of independent authority increases as the founding organization's influence decreases.

Partnership Type	One Organization The charter school is a major program or department within the founding organization. Staff members of the charter school are employees of the founding organization.	Subsidiary Corporation The charter school is a subsidiary corporation organized under the founding organization's corporate structure.	Two Organizations – Formal Linkages Predominate The charter school is separately incorporated as a freestanding organization. Governance and management structures of the founding organization and charter school are connected to some degree. Formal linkages predominate.	Two Organizations – Informal Linkages Predominate The charter school is separately incorporated as a freestanding organization. Governance and management structures of the founding organization and charter school are not closely connected. Linkages are more informal.
Who Selects or Appoints Charter School Board Directors	The charter school does not have its own governing board; however, there may be an advisory group whose feedback is sought but which does not make policy.	The subsidiary corporation has a separate board which is subordinate to the board of the founding organization.	Governance structures of the founding organization and charter school are connected to some degree. Some degree of overlap in board memberships among the two organizations.	As a reflection of state charter school legislation or agreement among the partners, the two organizations rarely share any common members if at all.
Who Holds Charter	Founding organization.	Founding organization.	Charter school board.	Charter school board.
Who Selects or Appoints Principal[6]	The chief staff officer of the founding organization or designee.	Usually the chief staff officer of the founding organization; subsidiary board may be involved.	The chief staff officer of the founding organization and/or the board of the charter school.	The charter school board hires the chief staff person or principal of the charter school.
Principal Reporting	The charter school principal reports to the chief staff officer of the founding organization or	The principal usually reports to the chief staff officer of the founding organization; may also report to the	The principal may report to either the chief staff officer of the founding organization or the board of the	The principal reports to the charter school board.

[6] If the charter school has contracted with a private organization or firm for educational management services, selection/appointment of the principal, principal reporting relationship, and designation of employer of record are subject to negotiation and may be addressed differently in the agreement between the founding organization and the management firm.

Relationship	designee.	subsidiary board.	charter school or both.	
Who Employs the Staff	Founding organization.	Founding organization.	Charter school board.	Charter school board.
Budget Authority	The budget of the charter school is part of the overall budget of the founding organization subject to ultimate approval by the board of the founding org.	The budget of the charter school may be part of the overall budget of the founding organization subject to ultimate approval by the board of the founding org.	The charter school board approves the budget.	The charter school board approves the budget.

SOME EXAMPLES

ONE ORGANIZATION

The East Bay Conservation Corps (EBCC) in Oakland, California exemplifies this partnership type. The charter school exists as a major program of the founding organization. There is no separate legal structure. Staff members of the charter school are employees of the founding organization. The board of the founding organization serves as the board of the charter school.

At East Bay, the charter school principal is hired by, and reports directly to, the executive director, who in turn is hired by, and reports to, the board of directors of the East Bay Conservation Corps. The EBCC is responsible for all administrative functions of the charter school including personnel, finances, operations, and fund development. In Chapter 6, there is a link to a copy of the East Bay Conservation Corps Charter School Governance and Administrative Reporting Structure Overview. This details the roles and relationships among the board of East Bay Conservation Corps, the Executive Director, and the Head of the charter school.

SUBSIDIARY CORPORATION

The relationship between the Milwaukee Center for Independence (MCFI) and the School for Early Development and Achievement charter school is an example of the second partnership model. The charter school is a wholly owned nonprofit subsidiary corporation of MCFI. MCFI has had considerable experience in structuring such subsidiary corporations. The subsidiary has a separate board of directors. The Vice President of Human Services of MCFI serves as president of the charter school board. The charter school administrator is hired by, and reports to, the Vice President of Human Services who, in turn, reports to the MCFI President/Executive Director. The MCFI President/Executive Director also serves as chair of the charter school board. The charter school will enter into a management agreement with MCFI for food, custodial, finance/fiscal, information technology, human resources, and therapy services. In addition, the charter school will receive public relations and fund development support from MCFI.

This charter school is an example of the full service model described in Chapter 3. The charter school will be closely linked with a birth-to-three program and a day-care center in order to provide a seamless continuum of educational programs and support services for children ages 0-8 and their families. In this unique effort, staff of the charter school, the birth-to-three program and the day-care center, all employees of MCFI, will work closely with other MCFI program staff and external partner agencies. One supervisory structure ultimately re-enforces the full service school model.

TWO ORGANIZATIONS – FORMAL LINKAGES PREDOMINATE

The linkage between Northwestern University Settlement Association (NUSA) and the Noble Street Charter School is an example of the third partnership type. In this partnership configuration, there are two separate 501(c)(3) nonprofit corporations. As required by law, each corporation has its own board of directors. Fifty percent of the Noble Street Charter School board is appointed by Northwestern University Settlement Association. The NUSA Executive Director is the nonpaid president of the charter school board. The principal of the charter school reports to the board president (Northwestern University Settlement Association executive director).

Each corporation carries its own insurance and receives an independent financial audit. The charter school enters into an annual services and equipment agreement with the NUSA. This agreement covers the Northwestern University Settlement Association's provision of management services, accounting, payroll, use of telephones, faxes and computers, fund development, as well as use of the NUSA's overnight camp and retreat center by charter school faculty and staff. With regard to facilities, the Northwestern University Settlement Association owns the structure; the charter school owns contents and leasehold improvements. The facility lease is annually reviewed and signed by the two board chairs. Contracts detail facilities use by each corporation. Sample agreements and contracts can be viewed at http://www.uscharterschools.org/gb/community/contract1.doc and http://www.uscharterschools.org/gb/community/contract2.doc

Another example of this partnership type is Mercer Street Friends and the Village Charter School. This partnership shares many common elements with the Northwestern University Settlement Association/Noble Street Charter School partnership. There is substantially less overlap in membership among the two boards.

TWO ORGANIZATIONS – INFORMAL LINKAGES PREDOMINATE

The Neighborhood House Charter School in Dorchester, MA was an outgrowth of the nonprofit Federated Dorchester Neighborhood Houses, Inc., a community-based educational and social service organization operating in Dorchester for over 30 years. The student body spans pre-K to eighth grade. Neighborhood House Charter School is an example of the fourth partnership type in which the charter school exists as a separate legal entity and the relationship with the founding organization is less structured than in the third partnership type described above. The school leases facilities in a separate location and conducts fundraising independently of the founding organization. Neighborhood House Charter School, whose levels of student achievement have drawn state and

national attention, has chosen a more separate path of development with a

primary focus on its role as an educational institution.

Factors Determining the Choice of the Structural Relationship

Here are some of the common influences on the choice of the structural relationship of the partnership:

- What degree of control of the charter school will be sought by the founding organization?
- What effect will the structure of the partnership have on the charter school management's ability to be flexible and innovative in operating the charter school? The ability to innovate is one of the central values of the charter school movement.
- What is the founding organization's vision for the charter school and does this vision imply a particular view of the partnership structure?
- In cases where a group of charter school organizers first approaches a community-based nonprofit organization to propose collaboration, what is the organizers' vision for the charter school and, similarly, does this vision imply a particular view of the partnership structure? In some cases, educators interested in a charter school start-up and looking forward to a measure of independence might be fearful of constraints placed on them by a subsidiary relationship to a pre-existing organization.
- What degree of liability for the charter school is the founding organization willing to assume, and how does this shape the partnership agreement? Related to this question, how much of a financial investment in the charter school is the community-based nonprofit making? If, for example, the founding organization is signing on a facility loan, it may want more control in financial matters.
- What are the legal and regulatory requirements of applicable state charter school legislation that have impact on the legal and financial options available to the founding organization? For example, in some states, the charter school must be a separate legal entity, distinct from the founding organization.
- How closely do the organizations plan to work together in the delivery of services? For example, if the founding organization is a youth-serving nonprofit and many of the children who will be enrolled in the charter school are also being served by the nonprofit through its existing programs, this would argue for a closer partnership linkage.

- How well does the charter school fit into the community-based organization's portfolio of programs and services? For example a youth- and family-serving nonprofit might be more interested in a closely-knit relationship than an environmental league which may have little experience in operating youth programs.
- How much administrative support of the charter school is envisioned by the founding organization? The more intertwined the administrative structures and procedures of the charter school and founding organization are expected to be, the more linkages there will be.

The list of questions on the following two pages provides additional guidance and can help shape the governance and management responsibilities within the partnership between the founding nonprofit organization and the charter school.[7] As you think about responses to these questions, keep in mind that there is no one right answer as to how these various responsibilities should be allocated. A range of optional approaches can be made to work effectively. Responses to the questions can allow for an even balance of power or for one that favors either the founding organization or the charter school. As previously mentioned, the charter school law in your state will have a significant impact on possible answers to these and other questions.

[7] Adapted from "Allocating Governance and Management Responsibilities" in Arsenault, Jane, Forging Nonprofit Alliances, San Francisco, CA: Jossey-Bass, 1998.

PARTNERSHIP TYPE AND RESPONSIBILITIES

Please note: By way of illustration, optional answers to the questions are listed below. In some cases there may be other options available or required. These sample scenarios may conflict slightly with the four partnership types described in pure form in the continuum at a glance chart above. They are offered to suggest the range of options available in structuring the relationships.

Partnership Type	One Organization	Subsidiary Corporation	Two Organizations – Formal Linkages Predominate	Two Organizations – Informal Linkages Predominate
How will charter school board directors be selected?	There is no separate charter school governing board. There may be a charter school advisory group (with the board of the founding organization choosing candidates/ appointing members).	The charter school identifies its own list of candidates; the founding organization board then chooses directors from this list.	The charter school board identifies its own candidates. The charter school board takes into consideration the advice of the founding board but exercises independent judgment in selecting board directors.	The charter school board identifies its own candidates and elects board directors on its own.
How will charter school board directors be removed?	The board of the founding organization has the authority to remove members of the charter school advisory group.	The board of the founding organization may advise the charter school board to remove members.	The charter school board alone has the authority to remove members of its own board.	
Will the board of the founding organization have an interlocking membership with the board of the charter school?	The board of the founding organization and the charter school may have a specified number of seats on each other's boards.	The founding organization will have a specified number of seats on the charter school board. The charter school will have no seats on the board of the founding organization.	Neither the founding organization nor the charter school will have seats on each other's boards.	

How will the chief staff person of the charter school (usually called the principal) be selected?	The Executive Director of the founding organization will appoint the principal of the charter school.	The Executive Director of the founding organization will appoint the principal of the charter school from final candidates identified by the school board.	The Executive Director of the founding organization will advise the charter school board, which will hire its own principal.	The charter school board will hire the principal without involvement of the founding organization.

Partnership Type	One Organization	Subsidiary Corporation	Two Organizations – Formal Linkages Predominate	Two Organizations – Informal Linkages Predominate
How will the charter school principal be supervised and evaluated?	The Executive Director of the founding organization will supervise and evaluate the school principal.	The Executive Director of the founding organization and the charter school board will jointly supervise and evaluate the principal.	The charter board will supervise and evaluate the principal without involvement of the founding organization.	
What will be the nature of financial and programmatic reporting between the founding organization and the charter school? (Dependent on who holds the charter)	The board of the founding organization will determine the information that the school will be required to submit and will determine the information that it will provide the charter school in turn.	The boards of the founding organization and the charter school will jointly determine the information to be exchanged.	The charter school board will determine the financial and programmatic information to be shared with the founding organization.	
What will be the degree of the founding organization's control over the charter school with regard to matters such as ability to sign contracts and leases; enter into cooperative agreements or joint ventures with other organizations; incur debt; raise funds; and,	The charter school must seek the approval of the founding organization with regard to some or all of the following: sign contracts and leases; enter into cooperative agreements or joint ventures with other organizations; incur debt; raise funds; own real estate.	The charter school shall have sole authority with regard to some or all of the following: sign contracts and leases; enter into cooperative agreements or joint ventures with other organizations; incur debt; raise funds; own real estate.		

own real estate?				
How will ownership and copyright be determined for materials/intellectual property created by the charter school?	The board of the founding organization will hold ownership and copyright for materials/intellectual property created by the charter school.	The boards of the founding organization and the charter school jointly hold ownership and copyright.	The charter school board will hold ownership and copyright.	

Tools for Structuring the Partnership

Regardless of the specific answers to the questions above, the founding organizations and charter schools interviewed for this publication have relied on some of the following tools for structuring the partnership and clearly defining roles and responsibilities:

Bylaws. Bylaw language to describe the governance structure of the charter school including size and composition of the board of directors, manner of appointing or selecting board directors, length of terms of service, powers of the board of directors of the charter school, powers of the founding organization, and other matters. In Chapter 6, there are references to sample bylaw excerpts showing how common partnership structuring issues are being addressed.

Organizational Charts. Organizational charts that depict the staffing and supervision structure of the charter school and its relationship to the overall staffing and supervision structure of the founding organization are also important tools for communicating agreements about the partnership structure. Frequently, the process of thinking through and finally reaching agreement is facilitated by creating and repeatedly revising a "picture" of what the roles and relationships will look like until it "looks right."

Of course, actual experience after the charter school startup will provide the "reality check" that often leads to further changes and improvements. In Chapter 6, there are links to sample organizational charts showing how common partnership structuring issues are being addressed including an example of charter school separately incorporated from founding organization and an example of charter school organized as a major program within the founding nonprofit.

The Use Of Written Management Agreements. A management agreement is a vehicle used to formalize founding organization and charter school commitments to the partnership. Such an agreement must be clear, concise, straightforward, and unambiguous. A well-written management agreement will incorporate the following elements:

1. the terms of the partnership, including objectives, procedures, roles, authorities and timelines are clear and detailed enough to guide the process, written in concise language, and available to responsible parties representing the founding organization and charter school;
2. mechanisms are in place to detect early signs of problems, and that corrective measures are identified;
3. expected services are identified;
4. any payments by the school to the CBO for services are clearly delineated;
5. any payments by the CBO to the school are clearly delineated; if these payments are in the form of loans that the CBO expects to be repaid, the terms of repayment are explicitly set forth in the management agreement or other document.

6. financial, human resource, communication/information management, and accountability needs and commitments are established;
7. evaluation requirements, performance measures, and reporting arrangements are established;
8. flexibility is built into the agreement to allow it to be adapted to changing external/internal circumstances;
9. details regarding ownership of property, such as office equipment, sets of books, and facilities, or insurance requirements are included;
10. the partnership's monitoring and evaluation systems are addressed; and
11. provisions for changing or terminating the partnership if necessary are included.

Many CBO-linked charter schools contract with the founding organization for back office services including payroll, budgeting, personal management, office technology, and related services. Once again, as with organizational charts, the actual process of writing the management agreement provides the partners with additional opportunities to further clarify roles and responsibilities. Sample management agreements are referenced in Chapter 6.

Other Considerations in Structuring the Partnership

Flexibility in Negotiating Roles And Responsibilities

When negotiating roles and responsibilities for partnership members, remember that flexibility is going to be an important part of developing a solid working relationship. Several CBO-linked charter school leaders said that their actual roles in the partnership turned out to be different from their planned roles. As the charter school is designed and during start-up and operation, roles will change and evolve in ways that are impossible to predict.

Activities will vary from one partnership to the next, and therefore roles and responsibilities will vary as well. When determining roles and responsibilities, consider what strengths, expertise, experience, and availability each partner can bring to the charter school. Are there existing staff in the founding organization whose positions will be affected by the partnership with the new charter school? How will the work of existing staff be integrated into the partnership, and what expectations are there for their roles?

Assuring Alignment With The Founders' Vision

One of the strongest influences on structuring the partnership between the charter school and the founding nonprofit has to do with assuring that the charter school operates in ways that reflect the founders' motivation and vision in starting the charter school. When allowed by law, bylaw language can grant the founding organization the right to appoint some or all of the charter school board directors as a way to assure influence on charter school direction. In states where charter school legislation mandates a strict legal separation between the charter school and the founding organization, organizers are

still able to establish linkages. In one instance, the executive director of the founding nonprofit was elected to the charter school board as a private citizen. In another case, the former president of the founding organization's board was elected president of the newly formed charter school.

Involvement Of Faith-Based Organizations

In recent years, the country has witnessed increased involvement of faith-based organizations in efforts to improve public education. In several sites around the country, church leaders, and others associated with religious groups, have been involved - in their roles as community leaders -- in helping to develop charter schools. In 2001, the Bush Administration announced a commitment to encouraging faith-based organizations to become involved in public education. Initiatives of the administration include expanding before- and after-school learning opportunities by granting states and school districts the freedom to award grants to faith-based organizations.

Since charter schools are public schools, the U.S. Department of Education has issued specific policy guidance regarding appropriate roles that faith-based organizations can play in public education. The Web site http://www.uscharterschools.org/pub/uscs_docs/fr/pcsp_guidance.htm addresses the involvement of faith-based and community-based organizations. Religious expression, the use of the facilities of a religious organization, and the manner in which religious leaders and members can be involved in charter schools are some of the topics that are addressed. (Scroll down to Section II for the most relevant guidelines.)

Go to: http://www.ed.gov/inits/religionandschools/v-guide.html to access a copy of Guidelines for School Officials, Volunteers and Mentors Participating in Public School Community Partnerships. This document presents guidelines for faith communities based on the First Amendment in public schools. The document will be helpful in structuring partnerships with faith-based organizations. For additional information go to: http://www.ed.gov/pubs/commonground/common_notes.html#note1. This document explains how faith communities play a vital role in reaching out and connecting to families and children and often become involved in and supportive of education issues of importance in their local communities.

Another helpful document is available at: http://www.ed.gov/pubs/commonground/sld001.htm. The Partnership for Family Involvement in Education, established by the U.S. Department of Education, also provides information for religious groups, including case studies of how faith-based organizations can impact public education positively; for more information visit http://pfie.ed.gov. It is expected that further information will be forthcoming as the Bush Administration's faith-based initiative unfolds. This information will be

posted on http://www.charterfriends.org/tech-assist.html as additional details become available.

The Special Case of the Charter School Facility

Some CBO-linked charter schools inhabit facilities owned by the CBO; others lease their facilities from third parties. In other cases, the charter school itself owns the facility. The best approach will vary from partnership to partnership, but one imperative applies to all of the options: the need to clarify ownership of and responsibility for facilities. These concerns are most acute when the CBO and the charter school are separate entities. Consider these questions:

- If the facility is to be leased from a third party, who will lease the building — the CBO or the charter school?
- If the facility will be owned, who will hold the title — the CBO or the charter school?
- How will the costs of capital improvements, maintenance, and ongoing lease or mortgage payments be funded?
- In the event the partnership ends, what will happen to the facility?

Avoidance Of Self-Dealing and Conflict-Of-Interest

The experience of many charter schools linked to community-based nonprofits demonstrates that the partnerships provide the schools with many benefits and implicit or explicit subsidies. It should be mentioned, however, that the reverse could occur. An organization in financial trouble (or even one that is financially strong) could regard the charter school as a "cash cow" and abuse its role in the school's governance, e.g. by charging exorbitant rent on a property it owns; charging a high rate for administrative services it provides; or using the school payroll to employ people whom the founding organization can't afford to employ. While there is no evidence that this is occurring, it is important to structure the partner relationships between the nonprofit and the charter school in such a way that any self-dealing or conflict of interest is avoided.

Proposed rental and lease costs and fees for administrative services should be examined to make sure they are in line with market rates. In cases where the charter school is a separate legal entity, it should be free to contract with other organizations for services if it sees fit.

Due Diligence Review

In instances where a group of charter school organizers is seeking a CBO as a partner, a due diligence examination might be in order. Due diligence is the process by which one party examines another to determine its fitness to enter into a partnership. Typically such an examination is carried out by an attorney and an accountant hired for this purpose although board members with appropriate skills could play this role. A due diligence examination focuses on determining whether there are fiscal or legal problems

that would prevent the community-based organization from fulfilling the terms of the partnership agreement or that would cause financial or legal problems for the new charter school.[8]

Some potential problem areas might include actual or threatened legal action against the nonprofit, problems with the IRS, and serious problems identified in an audit or management letter concerning internal controls.

In addition to the areas covered in a typical due diligence check, a review of the management and governance structures currently in place as well as the quality of board staff relations would be advisable. For additional assistance in addressing other legal, financial and governance policy matters, refer to Creating an Effective Charter School Governing Board Guidebook published by the Charter Friends National Network at: http://www.uscharterschools.org/gb/governance/

[8] Arsenault, Jane. Forging Nonprofit Alliances., San Francisco, CA: Jossey-Bass, 1998

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Chapter 5: Growing and Sustaining the Partnership

Partnership Building Challenge: How Can The Partnership Be Strengthened and Sustained?

In this chapter, we begin by delineating some of the characteristics of successful partnerships, knowledge of which can benefit CBO-linked charter schools. Next, we identify a number of proven strategies for overcoming turf issues and other barriers to effective partnerships between CBOs and the charter schools with which they are linked. We follow with other partnership building lessons offered by some of the CBO-linked charter schools interviewed for this technical assistance guide. We conclude the chapter with suggestions for evaluating and renegotiating a partnership.

Characteristics Of Successful Partnerships

During a period of time when partnerships, collaborations and alliances are increasingly common among organizations of all types, CBO-linked charter schools can benefit from the growing research on best practices. This chapter summarizes some of the research as well as the experience of leaders of the CBO-linked charter schools interviewed for this publication.

A word of advice: Given the wide range of partnership structures observed and summarized in Chapter 4 by means of the Partnership Continuum, the suggestions for strengthening and sustaining partnerships do not apply in the same way to all CBO-linked charter schools. Some of the guidance will apply most directly to schools that fall generally within the first three partnership types. In other cases, some of the practices will not apply at all. At the same time, CBO-linked charter schools with less robust ties to the founding organization will find much of the guidance useful to them as well. Again, one size does not fit all.

The authors of Getting Partnering Right[9] have identified three elements that repeatedly and consistently emerge in the successful partnerships they studied: impact, intimacy, and vision. The presence of these elements is crucial; without them, partnerships rarely get off the ground or soon fail.

- "Impact" refers to a partnership's capacity to deliver tangible results, to add real value. Every successful partnership has impact as its reason for being. In this regard, it is important to develop strong goals for the partnership effort.
- "Intimacy" characterizes the intense level of closeness in how individuals within the partnership relate to each other. This sense of intimacy is fostered by defining roles with clarity around the needs of the customer.
- "Vision" is a compelling shared picture of what the partnership can achieve and how it will get there. Efforts should be made to continually grow the common ground implied in a shared vision of partnership success.

In another recent study, "Strategic Restructuring: Findings from a Study of Integration and Alliances among Nonprofit Social Service and Cultural Organizations in the United States"[10], the following factors were identified as promoting successful partnerships:

- Leaders who believe strongly in the partnership and demonstrate this belief.
- Multiple forms of communication to keep all stakeholders — staff, board members, funders, and clients — up-to-date on plans, problems and benefits of the partnership.
- Face-to-face communication with partner organizations in the form of meetings, trainings, parties, and other forums to build trust and understanding among staff members.
- Flexibility — even in the best-planned partnerships, an understanding that unforeseen issues will arise, mistakes will be made, and alternative paths identified.
- Early evidence of benefits to assure everyone that they are on the right track.

A number of the CBO-linked charter schools interviewed for this publication reflect many of these practices. Future partnership efforts will benefit from the same guidance. To locate additional resources for developing and maintaining effective partnerships, see Chapter 6.

Overcoming Turf Issues and Other Barriers to Effective Partnerships

Creating a CBO-linked charter school means creating a partnership out of groups and institutions that historically have been isolated from each other. Schools and community-based nonprofits, while sharing interests in the children they serve, often have their own concerns and agendas. The

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[9] Rackham, Neil, Freidman, Lawrence, and Ruff, Richard, Getting Partnering Right, New York: McGraw-Hill, 1996.

[10] Kohm, Amelia, La Piana, David, and Gowdy, Heather, Strategic Restructuring: Findings from a Study of Integration and Alliances among Nonprofit Social Service and Cultural Organizations in the United States, Washington, DC: The Aspen Institute, 2000.

merging of disciplines and perspectives reflected in the CBO-linked charter school is one of its major strengths and, at the same time, a source of potential obstacles.[11]

Turf issues are bound to surface when people with different training and experience are brought together for the first time in a partnership effort. Add to this the inherent power shift that occurs in a CBO-linked charter school — away from the charter school board and principal alone and toward some degree of shared partnership with a pre-existing nonprofit — and the potential for hurt feelings, bruised egos, and miscommunication can be great.

It can take some time to smooth over initial problems, but by anticipating some of these problems and through effective planning most of the potential issues can be resolved early on or prevented altogether. In this regard, the executive director of the founding organization and the principal of the charter school are in a position to model for others a collaborative leadership style that will influence behavior at every level of the partnership. In cases where there are two separate organizations, chairs of the two boards can model collaborative leadership in a similar fashion.

The degree to which some of the following issues and barriers surface will depend, in part, on the type of partnership being created. (See the partnership continuum in Chapter 4.)

Conflicting Work Styles

Every profession has a standard or routine by which its members are accustomed to working. When you bring teachers together with human service organization staff, the difference in underlying assumptions and work styles can be expected to cause some initial tension. Even among educators drawn to charter schools and the opportunities for innovation, the paradigm of "my classroom" can be an obstacle to working collaboratively as part of a multidisciplinary team with staff of the founding organization and other community agencies. And in spite of the frequent references to collaboration in the nonprofit world, most nonprofit leaders will admit that real world practice doesn't always match the rhetoric. If these differences in work style interfere with the flow of information and the development of cooperative working relationships, they will hinder the success of the CBO/charter school partnership.

The executive director of Northwestern University Settlement House and the principal of the Noble Street Charter School in Chicago agree that their partnership represents a dramatic change for all involved. The executive director observed:

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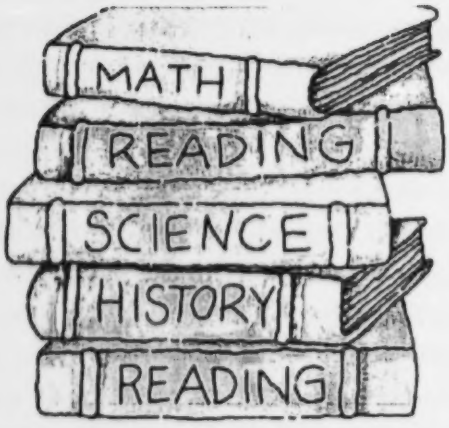
[11] This section draws on Building A Community School: A Revolutionary Design in Public Education, published by the Children's Aid Society of New York City, 1995.

"The charter school has forever changed the Settlement House and we recognize that this is a big change for the existing staff. New relationships needed to be built with charter school staff. At the same time, it is especially important for teachers that come from other systems to understand that this is a new kind of school and a new kind of organization."

SPEAKING DIFFERENT "LANGUAGES"

"Authentic assessment," "customer-focused," "strategic vision," "standardized tests," "social entrepreneurship." Shared or common language is critical to the success of a partnership. How people understand and interpret language has a very significant impact on how they interact with each other. Within the partnership, there will be a mix of staff who have developed their own distinct professional language or jargon. Terms that have very clear and powerful meanings to some may come across as empty expressions to others.

For effective communication to take place, such barriers will have to be broken down and a new common language will have to be developed. Members of the partnership must ensure they have a common understanding of key terms and concepts relating to collaboration, education, youth and family development, the impact of poverty, and others. One useful approach would be to devise a "glossary" of key concepts that will serve as the foundation for partnership efforts. The very process of developing common definitions for such a glossary would also help to solidify the sense of team among board and staff members from the charter school and the founding organization. Here are other examples from three CBO-linked charter schools.



- For the Passage Charter School and its partner Teaching Prevention, Promoting Involvement, the common language is the Search Institute's Youth Developmental Assets Model. Staffs of both organizations have been trained in this model. Both describe themselves as asset-based organizations. They speak the "same language."
- Educators at the YWCA Global Career Academy, as employees of the YWCA of Greater Milwaukee, receive training in "continuous quality improvement" tools in use throughout the founding organization. They are also oriented to the philosophy of "One Imperative" — the anti-racism initiative of the national YWCA. This facilitates communication and collaboration with staff in other parts of the organization.
- Staff of the Community Day Charter School in Lawrence, MA attend a week-long orientation before the start of school during which themes like "children and parents as customers" and "all kids are gifted" are stressed. Staff

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also participate in a city tour that is intended to reinforce the community-based nature of the charter school.

Conflicting Priorities

It is an asset of the CBO/charter school partnership that people with different expertise work together as a team for children and their families, but these groups will naturally have their own distinct priorities, rooted in their beliefs, professional training, and personal experience. Teachers, for example, will naturally focus on academic achievement; program staff of the founding organization might focus on acquisition of certain social skills.

If priorities conflict too much, a sense of competition can easily develop between different staff members. This conflict can become intense when "conflicting priorities" become "conflicting budget" or "facilities use" priorities. A consensus on common priorities should be developed and kept in focus at all times. Building this consensus should really begin during the initial planning process.

Partner vs. Tenant

Consider a partnership in which the community-based organization and the charter school envision very strong ties between each other and the charter school is housed in facilities owned by the founding organization. If the school is viewed merely as a tenant rather than an integral member of the partnership team, much of the potential of the CBO-linked charter school will go unrealized. From the outset of the partnership effort, everyone involved should be clear that the rationale for a partnership between the founding community-based organization and the charter school goes deeper than "having someone to lease the vacant space."

Credentials

Staff with years of training and experience are not always receptive to new ideas coming from people who lack the same professional credentials. Not all staff within the partnership are going to have credentials that reflect advanced degrees or training, but their knowledge and experience must be acknowledged and tapped to realize the full potential of the partnership. Even among the professions, there may be some biases against one field or another. In one CBO-linked charter school, the principal at first resisted involvement of an experienced child psychologist on the staff of the founding organization because this person was not a "certified school psychologist."

Other Lessons Learned

Build and Nurture the Founding Organization Board's Support for the Charter School

It is also critical to maintain a strong sense of support for the charter school with the board of the founding organization. In the case of the Noble Street Charter School, the executive director of the Northwestern University Settlement House provides the

board with information about any new development of the charter school via e-mail and other means. This has the effect of keeping board directors excited and informed about the charter school. As a result, it has been easier to deal with problems that have arisen along the way. Board support can be further nurtured by sharing successes of the charter school with the board and the community at large.

Build Broad Community Support Early On

Developing a diverse steering committee during the planning process, allowed Teaching Prevention, Promoting Involvement, the founder of Passage Charter School in Montrose, CO to build a strong base of community support. Members of the steering committee, many of whom went on to serve as board directors of the charter school, included the city manager, a high school principal, a job training agency manager, a former teen parent, a teacher from the district consumer and family studies department, a member of the Board of Education, a child care consultant, editor of the local paper, and three additional well-connected community members. They have played a continuing role in mobilizing community services and support for the charter school. Some examples include:

- the school district delivers hot lunches to students enrolled in the charter school;
- a hospital has served as a source of job internships for students;
- the Department of Social Services obtained a grant to furnish the daycare center associated with the charter school and pay day-care staff for first year of operation;
- the charter school has benefited from positive news coverage. A newspaper editor served on the planning committee; and
- the charter school facility sits on city-owned land leased for $1 per year. The city also paid for foundation work during construction.

The leaders of this charter school organizing effort have noted remarkably few setbacks and attribute this success to the broad base of community support.

Avoid Micromanagement of Charter School Staff

Especially in instances where the charter school is closely connected to the founding organization, executive staff leadership of the founding organization will avoid micromanagement of the charter school staff. There is clarity about who has the educational expertise. In the words of one executive director, "We consider the teachers to be the instructional leaders of the school." The management philosophy is one of empowerment and support of the

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charter school staff. In the words of another founding organization's executive director, "It's important to recognize who the educational experts are; usually it's not us."

Foster Relationship-Building among Staff of the Founding Organization and Charter School

It is very important to build and maintain relationships among staff of the founding organization and charter school, regardless of the legal partnership framework in place. Moreover, it is especially important when an ongoing, mutually supportive relationship between the charter school and the founding organization is a central element of the overall vision. This relationship building can occur through a variety of activities and should be appropriate to the type of partnership being envisioned:

Conduct joint meetings of staff of the founding organization and charter school. In the first year of operation, the principal of the Noble Street Charter School attended all of the settlement house's staff meetings involving program staff. Once a semester, the principal participates in an agency-wide staff development session with other staff from the Northwestern University Settlement Association. At Community Day Charter School, in-service training days are scheduled. The founding organization, Community Daycare Center, and the charter school close down on these days to enable all staff to attend the training together.

Include charter staff school leadership as part of the overall executive management team. In many nonprofit organizations, the executive director assembles an executive management team that includes key staff positions within the agency. In a number of the partnerships interviewed for this publication, the charter school administrator or principal is included as a full member of this executive management team. Such a practice clearly communicates to all involved the importance of the charter school to the overall work of the founding nonprofit. This practice also creates another setting in which to build relationships, share information and collaborate on major decisions. Once again, such a practice would be beneficial regardless of the legal relationship of the charter school and the founding organization.

Provide frequent, ongoing, and two-way communication through a variety of means. Community Daycare Center in Lawrence, MA provides a copy of the agency newsletter to all staff of the charter school. Staff members of the Noble Street Charter School in Chicago periodically give reports to the board of directors of the Northwestern University Settlement Association. Links to the charter school Web site or Web pages are prominently located on the Web sites of a number of the founding organizations interviewed for this publication.[12]

Involve staff in joint planning activities. Most nonprofits today engage in strategic

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[12] For some examples, go the following websites: East Bay Conservation Corp at http://www.ebcc-school.org, Mercer Street Friends at http://www.mercerstreetfriends.org/pages/programs/village.shtml, and Northwest University Settlement House at http://www.nscs.cook.k12.il.us/web/index.htm.

and annual planning. Leadership of the founding organization should see to it that staff and board members of the charter school are involved in meaningful ways in such planning efforts. Staff of the founding organization should also be appropriately involved in planning for the charter school. Silver Spring Neighborhood Center in Milwaukee utilized a number of strategies to strengthen internal staff relationships between program departments and the educational leaders of the proposed charter school. During its charter school planning process, individual program staff efforts and the charter school design were linked together around a common set of seven core economic empowerment and self-sufficiency outcomes for children and families.

This outcome model has existed for a number of years and is a focal point in all new program design efforts. The organization also held an all-staff retreat in which program department staff identified resources they could share that would help the charter school be successful and also suggested ways that the charter school could support their success. See the sample worksheet from this retreat located in Chapter 6. Such activities can also be scheduled to maintain and strengthen agency-wide collaboration on an ongoing basis.

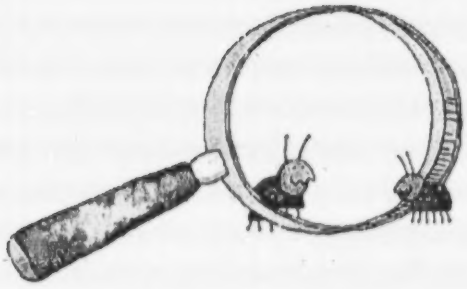
Provide frequent recognition of staff efforts. The sometimes difficult task of making the partnership work on a day-to-day basis usually falls to staff. Their level of commitment can be acknowledged and strengthened through thoughtful, consistent recognition of their efforts. The board president of the Northwestern University Settlement House sent personal letters to every agency staff person individually thanking them for support of the Noble Street Charter School. On Valentine's Day, the executive director of the Settlement House sent candy to each staff person with a personal note of thanks. On the day that the charter school staff moved the furniture for the last time before the school's opening, the executive director sent flowers to every faculty member with a personal note of thanks. It is not always necessary to include a tangible token of appreciation but individual recognition is the key.

Provide Relationship Building Among School Staff and Community Partners. Look for ways to promote and foster relationship building among staff of the charter school and other community partner organizations. At Codman Academy Charter School, every staff member spends one week each year on-site volunteering at a partner organization in order to build relationships, foster communication and learn the "ground knowledge" that only being there can provide. For example, the humanities teacher spends one week volunteering at the Huntington Theatre. According to Meg Campbell, Headmistress of the Codman Academy Charter School, "This serves as a powerful, effective professional development experience for our teachers as well."

EXPANDING THE SCOPE OF THE PARTNERSHIP

Developing an effective charter school requires time. It takes several years for all the elements to blend and work together smoothly. Take the example of a CBO-linked charter school and its founding organization partner sharing the vision of implementing a full service school model described in Chapter 3 of this publication. In the full service school approach, a comprehensive array of child and family support services is linked to the core education program of the school. Such an effort can be implemented on a modest budget or a much larger budget. Thinking in terms of services that can be adjusted depending on resources, or phased in over time, the partners could decide to start with a program of fairly modest size and then expand the scope of the effort over several years. Such a gradual phase-in might be advisable for reasons other than budget. Below is an example.

YEAR 1 – START-UP PROGRAM	YEARS 1-2 – MEDIUM PROGRAM	YEARS 3-5 – FULL PROGRAM
• After School Program • Family Resource Center	• Before and After School Program • Family Resource Center • Summer Program • Health Screenings • Counseling Services	• Before and After School Program • Family Resource Center • Summer Program • Health Screenings • Counseling Services • Full Health Services • Adult Education • Small Business Development



Tap the Already Existing Networks and Relationships of the Founding Organization

Publicizing and communicating successes within the partnership and within the broader community is a high priority in sustaining the partnership, keeping staff and board members inspired and motivated, as well as attracting new support for the charter school. Especially in cases where the founding organization is well established, well respected and possessing a solid track record, the charter school's marketing, fund-raising, and public relations efforts will benefit greatly from its relationship with the nonprofit. A number of the CBO-linked charter schools interviewed for this publication noted that the positive feelings and sense of trust that parents had for the founding nonprofit organization carried over to the charter school.

The YWCA Global Career Academy in Milwaukee increased its visibility among community, foundation, civic, and political leaders through an information display at the YWCA's annual Circle of Women Luncheon, the founding organization's flagship event attended by over 1700 people. During the previous year's luncheon event, some of the charter school staff and students were a featured part of the program. In addition, through increased visibility for marketing and fund-raising, a CBO-linked charter school will be able to establish new collaborations with other community organizations, businesses and institutions because of its formal link to the nonprofit.

Create a Staff Position That Promotes Interaction Between the Founding Organization and the Charter School

Coordinating the efforts of program staff of the founding nonprofit with the charter school staff can be greatly enhanced through creation of a staff position with that specific purpose. Where and how such a staff position fits within the overall staffing structure will depend on the type of partnership model selected. A sample position description is available at http://www.uscharterschools.org/gb/community/posdesc.doc.

Also view the organizational charts located at http://www.uscharterschools.org/gb/community/orgchart1.doc and http://www.uscharterschools.org/gb/community/orgchart2.doc for examples of how such a coordinating position can be included in a staffing structure. In considering such a staff position, however, keep the following points in mind: First, realizing the goal of increased coordination of staff efforts will be elusive if other staff view coordination as "that person's job".

Even with such a staff position in place, coordination will need to be a priority that drives everyone's efforts. Secondly, even with the increased emphasis on collaboration in the funding community, securing the financial support for such a position may only be possible in a partnership of significant size.

A Word About Evaluation and Renegotiation

Evaluating the Partnership

Evaluation is a key element in building and maintaining the partnership between the founding organization and the charter school. Ideally, the objectives of the evaluation and the means by which evaluation will be conducted should be addressed early on as part of the charter school planning process. There is value in evaluation efforts that are integrated into the design of the partnership and collaboratively developed with members of the founding organization and charter school. The evaluation should be dynamic, changing with developments in the CBO-linked charter school.

Evaluation allows the partners to step back from the ongoing demands of the relationship to determine why the partnership is or is not effective. Overall, evaluating the partnership will assess whether the objectives, needs, and expectations of the partnership as a whole and of the individual parties — the charter school and the founding organization — have been met. Finally, it will be helpful to document the connection between various partnership activities and the achievement of the partnership's mission, in other words, whether the partnership has had positive impact in the lives of the children who attend charter school. Make sure that adequate records are kept and data is collected so that charter school progress and achievements attributable to the partnership can be measured.

Some of the other potential benefits of evaluating the partnership include:

- making improvements in the quality of shared decision-making;
- stimulating further development of clear policies and practices in the partnership; and
- deepening commitment to the partnership by the boards and staffs of the charter school and the founding organization.

While most studies of partnerships and collaborations note the importance of monitoring and evaluation, it is very difficult to locate resources and tools for partnership evaluation. There is one that can be recommended: The Amherst Wilder Foundation has published Collaboration: What Makes It Work and the Wilder Collaboration Factors Inventory: Assessing Your Collaboration's Strengths and Weaknesses. These publications will be helpful in evaluating the range of partnerships between CBOs and charter schools. See Chapter 6 for more details.

Renegotiating the Partnership[13]

An additional benefit of evaluation is that it can surface areas that require renegotiation. There may come a time when the charter school or the founding organization (or both) feels the need to renegotiate aspects of the partnership. Renegotiation is a logical step when the founding organization and the charter school want to continue the partnership, but:

- One or both of the partners can no longer carry out their responsibilities (because of staff changes, unrealistic commitments made in terms of time or resources, internal restructuring, etc.);
- A dispute arises that cannot be resolved within the current agreement;
- There is an opportunity to expand beyond the original scope of the partnership. (See "Expanding the Scope of the Partnership" above for an example.)
- There is an opportunity to add new members to the partnership; for example, a community health center that could provide additional services, a local corporation or other potential partner.

Renegotiating involves bringing the leadership of the charter school and the founding organization back to the table, and repeating the process of determining roles and responsibilities within the context of the issues that have arisen. Renegotiation should be viewed as an opportunity to strengthen the partnership, not as evidence of lasting failure or an irreconcilable difference.

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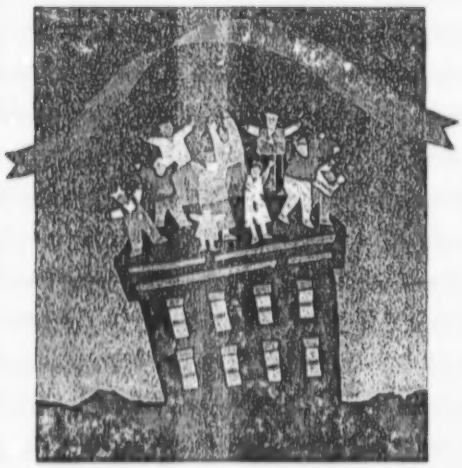
[13] The meaning of "renegotiation" will depend on the partnership type in place. If the charter school is a program of the founding organization rather that a legally separate organization, there may be nothing to "renegotiate."



Chapter 6: Conclusion and Additional Resources

Partnership Building Challenge: What Resources Are Available For Developing And Sustaining CBO-Linked Charter Schools?

The Future of Partnerships with Community-Based Nonprofits in the Charter School Movement

We can expect more and more charter schools initiated or supported by community-based nonprofit organizations in the future. There are several reasons for this. First of all, a number of major national nonprofits have adopted charter school development as a major initiative. They are described in Chapter 1. Presently, these include the National Council of La Raza, the YMCA of the USA, and the National Urban League.

It is very likely that other national nonprofits, especially those serving families and children, will launch similar initiatives in the coming years. Secondly, community-based nonprofit organizations that are not affiliated with national organizations or networks will very likely continue involvement in charter school development. In some cases they will launch their own charter schools like the Northwestern University Settlement Association (Chicago), and the Milwaukee Center for Independence. In other cases, they will serve as supporters for new charter schools that have an interest in establishing strong linkages with community-based organizations serving the children and families enrolled in the school. Finally, we can anticipate that some of the community-based nonprofits that have successfully operated one charter school will use their expertise and track record to open additional schools. The YWCA of Greater

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Milwaukee has recently launched a technical assistance division that will provide startup assistance for other nonprofit organizations wishing to launch charter schools.

Add to all of this the difficulties that are experienced by educators who launch charter schools without personal experience in critical areas such as finance, marketing, strategic planning, forging community alliances and fund development. As we have seen in some of the charter schools profiled in this guide, dedicated and talented educators, when they partner with experienced community-based organizations, are better able to focus on the education program of the charter school.

Additional Resources

Below is a selected list of organizations, publications, Web sites, and other resources that will be of great use to community-based nonprofit organizations interested in launching charter schools.

CHARTER SCHOOL DEVELOPMENT

Here are some resources for planning and operating charter schools:

Sample Documents:

Planning Grant Proposal. MCFI Charter School Planning Grant Application. http://www.uscharterschools.org/gb/community/plangrant.doc

Charter School Planning Timetable. Milwaukee Center for Independence. http://www.uscharterschools.org/gb/community/timetable.doc

Charter School Vision Worksheet. Frank Martinelli, The Center for Public Skills Training, Milwaukee, WI. http://www.uscharterschools.org/gb/community/vision.doc

Charter School Planning Project Interest Form. Sample recruitment flyer. http://www.uscharterschools.org/gb/community/interest.doc

East Bay Conservation Corps Charter School Governance and Administrative Reporting Structure Overview. http://www.uscharterschools.org/gb/community/structure.doc

Bylaw Excerpts Showing How Common Partnership Structuring Issues Are Being Addressed. http://www.uscharterschools.org/gb/community/bylaw1.doc

Charter School Bylaws. http://www.uscharterschools.org/gb/community/bylaw2.doc; http://www.uscharterschools.org/gb/community/bylaw3.doc; http://www.uscharterschools.org/gb/community/bylaw4.doc

Management Agreements. Passage Charter School and Noble Street Charter School. http://www.uscharterschools.org/gb/community/mgmt2.doc and http://www.uscharterschools.org/gb/community/mgmt1.doc

Organizational Charts: Noble Street Charter School and Northwestern University Settlement House, Chicago, IL — example of charter school separately incorporated from founding organization; East Bay Conservation Corps Charter School — example of charter school organized as a major program within the founding nonprofit. Charts available at http://www.uscharterschools.org/gb/community/orgchart3.doc and http://www.uscharterschools.org/gb/community/orgchart2.doc

Sample Description: Family Support Services Coordinator. O'Farrell Charter School, San Diego, CA. http://www.uscharterschools.org/gb/community/posdesc.doc

Sample Worksheet: Establishing Linkages Between Existing Programs and the Proposed Charter School. Silver Spring Neighborhood Center, Milwaukee, WI. http://www.uscharterschools.org/gb/community/linkages.doc

Organizations and Other Online Resources

Charter Friends National Network (CFNN)
http://www.charterfriends.org
Connects and supports resource centers and other state-level charter support organizations and activities. Useful publications include:

- Hassel, Bryan, and Hassel, Emily, If the Shoe Fits: A Guide for Charter Schools Thinking about Adopting a Comprehensive School Design, 2nd Edition, http://www.charterfriends.org/shoefits.html
- Adelman, Andrew, Jennings, Wayne, and Smith, Nancy, Charter Schools: Creating and Sustaining Family Friendly Schools, http://www.uscharterschools.org/gb/familyfriendly/
- Lin, Margaret, and, Hassel, Bryan, Charting a Clear Course: A Resource Guide for Building Successful Partnerships between Charter Schools and School Management Organizations 2nd Edition, http://www.charterfriends.org/contract.pdf
- Martinelli, Frank, Creating an Effective Charter School Governing Board Guidebook, http://www.uscharterschools.org/gb/governance/.

Individual printed copies of these resource guides are also available free of charge by contacting the Charter Friends National Network (CFNN) at 651-649-5479 or info@charterfriends.org.

US Charter Schools Web Site
http://www.uscharterschools.org
Comprehensive national charter school site provides planning guides, copies of sample documents, and extensive links and resources for charter school developers and operators.

Charter School Technical Assistance Organizations
http://www.charterfriends.org/contacts.html

Collection of Charter School State Notes
http://www.ecs.org/clearinghouse/24/11/2411.htm
Provides summaries of charter school policies in the several areas.

Are You Ready to Begin the Charter School Planning Process? A Self-Assessment to Determine Readiness (Part I) Source: National Council of La Raza. http://www.uscharterschools.org/gb/community/laraza1.doc

So You Want To Start A Charter School. Source: National Council of La Raza. http://www.uscharterschools.org/gb/community/laraza2.doc

DEVELOPING AND SUSTAINING PARTNERSHIPS AND COLLABORATIONS

The following resources are among the best available on the subject of developing and sustaining partnerships and collaborations involving nonprofits:

Publications:

- Arsenault, Jane, Forging Nonprofit Alliances, San Francisco, CA: Jossey-Bass, 1998.
- Kohm, Amelia, La Piana, David, and Gowdy, Heather, Strategic Restructuring: Findings from a Study of Integration and Alliances among Nonprofit Social Service and Cultural Organizations in the United States, Washington, DC: The Aspen Institute, 2000.
- Mattessich, Paul W. and Monsey, Barbara R., Collaboration: What Makes It Work, A Review of Research Literature on Factors Influencing Successful Collaboration, 2nd Edition, St. Paul, MN: Amherst H. Wilder Foundation, 2001.
- Mattessich, Paul, Murray-Close, Marta, Monsey, Barbara, Collaboration: What Makes It Work, 2nd Edition, St. Paul, MN: Wilder Publishing Center, 2001. This publication summarizes research drawn from close to 300 research studies on collaborations and partnerships. The publication includes the Collaboration Factors Inventory. While not specifically designed for a CBO-linked charter school partnership, the inventory can be adapted for use as a "partnership effectiveness" assessment tool. http://www.wilder.org.
- McLaughlin, Thomas A., Nonprofit Mergers and Alliances: A Strategic Planning Guide. New York: John Wiley & Sons, Inc., 1998.
- The National Assembly, The Community Collaboration Manual. Washington, DC: The National Assembly, 1991, 1993.
- Rackham, Neil, Friedman, Lawrence, and, Ruff, Richard, Getting Partnering Right. New York: McGraw-Hill, 1996.
- Sharken Simon, Judith, The Wilder Nonprofit Field Guide to Conducting Successful Focus Groups, Amherst Wilder Foundation, 1999.
- Winer, Michael and Ray, Karen, Collaboration Handbook: Creating, Sustaining and Enjoying the Journey, St. Paul: Amherst H. Wilder Foundation, 1992.

Video:

Strategic Alliances: Enhancing Your Effectiveness. From the Excellence in Nonprofit Leadership and Management Series produced by The Learning Institute for Nonprofit Organizations. Web site: http://www.uwex.edu/li; Telephone: 800-424-7367.

Other Online Resources:

The Landscape of Educational Contracting: Helpful Resources. A list of resources for charter school organizers considering contracting with educational service providers.
http://www.uscharterschools.org/gb/community/landscape.doc

Public Charter Schools Program (PCSP)
http://www.uscharterschools.org/pub/uscs_docs/fr/pcsp_info.htm

Integrating Support Services Into The Educational Program Of The New Charter School

Here are a number of useful resources for community-based nonprofits and others wishing to integrate a range of youth and family support services into the charter school design:

Publications:

- Dryfoos, Joan, Full Service Schools. San Francisco: Jossey-Bass, Inc., 1994.
- Calfee, Carol, Wittwer, Frank & Meredith, Mimi, Building the Full Service School: A Step by Step Guide. San Francisco, CA: Jossey-Bass, Inc., 1998.
- Children's Aid Society, Building A Community School: A Revolutionary Design in Public Education, New York, NY: Children's Aid Society of New York City, 1995.
- Metaville, Atelia, Learning Together: A Look at 20 School-Community Initiatives Flint, MI: Mott Foundation, 1998. Executive Summary available at http://www.mott.org/publications/mt97_learning_together.pdf. For a free copy of full report, make request by e-mail infocenter@mott.org.

Organizations:

The Search Institute
http://www.search-institute.org, tel: 800-888-7828
Offers a training program "Building Developmental Assets in School Communities" that shows educators how to initiate, increase, and strengthen the asset-building efforts in a school. Helpful publications include:

- Starkman, Neal, Scales, Peter C. and, Roberts, Clay, Great Places to Learn: How Asset-Building Schools Help Students Succeed, Minneapolis, MN: The Search Institute, 1999.
- Draayer, Donald, and Roehlkepartain, Eugene C., Learning and Living: How Asset Building for Youth Can Unify a School's Mission, Minneapolis, MN: The Search Institute, 1998.

Academy for Educational Development
http://www.aed.org, tel: 202-884-8000
Studies schools founded and operated by community-based organizations. Two related policy briefs are available: CBO Schools: A History of High Standards for All. Available at no charge at: http://www.aed.org/CBO_Schools/cboschools2.html and CBO Schools: An Education Resource Whose Time Has Come at: http://www.aed.org/CBO_Schools/CBOSchools1.html

Public Policy Associates
http://www.publicpolicy.com,
517-485-4477
Provides an array of technical assistance publications to support educators and business partners as they plan and implement employer-linked charter schools. Access publications at:

http://www.employercharterschools.com/learn/pubs.htm

National Center for Educational Alliances
http://www.ncup.org/, 718-289-5164
Works to expand opportunities for underprepared students in the United States and abroad by supporting collaboration among schools and other organizations.

National Association Of Partners In Education
http://www.napehq.org/, 703-836-4880
Publishes a number of how-to guides on all aspects of school community partnership building.

NATIONAL NONPROFITS SUPPORTING CHARTER SCHOOL DEVELOPMENT BY LOCAL AFFILIATES:

YMCA of the USA
Contact: Glenn Haley, Director of Strong Communities Agenda
YMCA of the USA
101 North Wacker Drive
Chicago, IL 60606
312-977-0031 Ext 8412
glenn.haley@ymca.net

National Council of La Raza
Contact: Jim Ford, Director
Charter School Development Initiative
1111 19 Street, NW, Suite 1000
Washington, D.C. 20036
202-776-1763
fordje@earthlink.net

National Urban League
Contact: Dr. Velma Cobb, Director of Education and Youth
120 Wall Street
New York, NY 10005
212-558-5355
vcobb@nul.org

Access More Tools for Charter Schools

Guidebooks are available on Creating an Effective Charter School Governing Board, Personnel Policies & Practices, Creating and Sustaining Family Friendly Institutions, and Mobilizing and Motivating Your Staff to Get Results. These guides can be accessed online at http://www.uscharterschools.org/gb/cfguides.htm. The Charter Friends National Network has a limited number of print summaries of the documents available. To request a copy of one, or all four, please send an e-mail to info@charterfriends.org.

About the Sponsoring Organizations

The Annie E. Casey Foundation is a private charitable organization dedicated to helping build better futures for disadvantaged children in the U.S. Recognizing that strong families and strong neighborhoods are interdependent, the Casey Foundation is supporting broad strategies for neighborhood development and family transformation in 22 urban communities around the nation through its Making Connections initiative. For more information about the Annie E. Casey Foundation and the Making Connections initiative, visit the Web site or contact:

The Annie E. Casey Foundation
Tel: (410) 547-6600
E-mail: webmail@aecf.org
Web: http://www.aecf.org/initiatives/ntfd/making.htm

The Charter Friends National Network (CFNN) is a project of the Minnesota-based Center for Policy Studies in cooperation with Hamline University. Founded in early 1997, CFNN's mission is to connect and support state-level charter school organizations — mainly nonprofit resource centers and associations of charter school operators.

The Charter Friends National Network
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Other Resource Guides Available from Charter Friends National Network

- Charter School Accountability: A Guide to Issues and Options for Charter Authorizers
- Charter School Facilities: A Resource Guide on Development and Financing

The Annie E. Casey Foundation

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